Business Services Industry

Environment Scan 2014

IBSA
Innovation & Business Skills Australia

Contents

About this Environment Scan

This Escan provides Innovation and Business Skills Australia (IBSA) with an opportunity to combine direct industry intelligence with statistical data on training and workforce participation. Through this process, skill needs and workforce development priorities are identified for Australia's innovation and business industries. The information is used by IBSA to advice government on refinements to training packages to meet the needs of industry and identify investment priorities for Australia's vocational education and training (VET) system.

This is the sixth year in which Industry Skills Councils (ISCs) have been required to prepare an Escan. The Escan aims to give readers an understanding of the factors currently shaping and impacting on the IBSA industries and their workforce development, IBSA's industry coverage comprises enabling skills and functions that are relevant across a wide range of industries. The Escan is consequently an important contribution to thinking on skills and workforce development across the board and will be of interest to many readers within government and industry.

Executive summary

Companies in the Business Services industry provide professional assistance to other businesses, such as strategic and technical advice, advertising, recruitment and administrative services.

A wide range of businesses can be classified as Business Services and definitions of the industry vary. For the purposes of this Escan, we have focused on five key sectors within the industry that are heavy users of the vocational education and training (VET) system. They are:

- legal services
- employment services
- management consulting
- contact centres, and
- advertising services, including public relations and market research and statistical services.

The five sectors combined generated an income of $55.3 billion in 2013, accounting for about 1.8 percent of total Australian industry income. Among the five sectors, the legal services and employment services sectors dominate the industry in terms of number of businesses and revenue generated.

There is significant variation across the Business Services sectors in terms of size, structure, and employment levels. However, there are common features too. All Business Services depend strongly on the quality of the people they employ to provide the services; brand recognition and customer service are critical for achieving a competitive edge; and because Business Services rely on the level of outsourcing of other businesses, the fortunes of each of these sectors is strongly linked to the state of the economy and business confidence.

Ongoing increases in outsourcing, advances in technology and mining industry activities are all contributing to a strong Business Services industry. The following trends are expected to have a significant impact on the Business Services industry in the next two to three years:

- Offshoring – the continuing drive for increased efficiency in the face of strong competitive pressures, as well as advances in communication technologies and skill shortages in Australia, have underpinned longer-term efforts to shift parts of the internal operations of some business services firms offshore. This trend particularly affects larger firms, which are continuing to shift back-of-office, process-style jobs offshore while keeping higher skilled, more complex jobs in Australia.
- Negative global economic environment – competition from imports and the high Australian dollar is expected to impact on the trade-exposed part of the industry. Businesses that import consumer goods and business inputs are likely to benefit. However, those that export their services and/or compete with overseas companies domestically are expected to face challenges.
- Technological developments – the cloud is expected to be increasingly used as businesses become more convinced that their data is safe. Mobile devices may also be used progressively more as business tools. The use of software that integrates various social media platforms for use in daily business processes is expected to enhance and extend internal and external collaboration. Big data analytics is expected to become critical to help businesses understand their clients and forecast more accurately.
- Mining industry changes – the shift from the investment to the production phase of the mining boom is likely to see ongoing changes in the nature of the demand for business services. For example, employment services firms may derive less benefit as this new phase requires a more permanent and generally smaller workforce.
- Deeper global engagement - larger business services enterprises are already working closely through partnerships and collaborations with overseas companies, particularly in Asia. This is expected to continue as Australian businesses recognise new opportunities in emerging markets and are supported by government to integrate more with Asia.

The Business Services workforce is expected to continue to expand in coming years. Forecasts indicate an increase in the workforce of all sectors. Management consultants and contact centres are expected to expand the most. Occupations requiring high level skills, such as solicitors, legal executives, and training and development professionals, are expected to be in highest demand. Corporate managers, especially corporate services managers, and advertising and sales managers, are expected to be among the strongest growing occupations in the workforce.

Key impacts for the Business Services workforce in coming years include the following:

- Customer centricity – improving customer experience and satisfaction is critical to all sectors in Business Services. As customers increasingly use self-help options to solve simple problems and routine processes are moved offshore, customer interactions have become proportionately more complex, requiring advanced relationship management skills. Customer focus is no longer enough. A 'customer centric' mindset is required. Customer centric individuals explore ways to satisfy the needs of their customers while delivering greater value and making it an easier and more enjoyable experience for their customers. They have the authority to solve challenges customers face on the spot, when they occur, and they see incremental sales as secondary to the degree to which customers have been satisfied.
- Staff retention – staff turnover is estimated to cost employers up to $1 million per annum but reducing churn by just 5 percent could result in a saving of $280,000 a year for every 100 people employed. Supporting employees at all levels to achieve balance pays a handsome dividend and is central to retaining and developing people. Balancing a flexible and adaptive approach in dealing with family, ageing and retirement and maternity/paternity with opportunities for career development is essential to ensuring the workplace is able to move with changing staff needs and expectations.
- Harnessing the extended labour force – the Business Services industry is beginning to rely more on contract workers, consultants and freelance workers to meet their business goals and respond to skills gaps and a rapidly changing economic environment. Some Business Services are even beginning to draw on the human resources of their customers to create responsive products and services. Organisations face challenges in understanding what skills and services contingent workers provide, making decisions on whether to fill a role or skill need with a contingent worker or a full-time employee and how to implement integrated workforce strategies that make the most of the benefits and reduce the risks of using a contingent workforce.
- Increasing demand for professionals – occupations involved in professional services are increasing their employment share, as businesses increasingly require higher level skills.

In light of industry and workforce trends in the Business Services industry, this Escan research has identified a number of areas where skill development should be focused:

- Customer service – Improving customer service skills so that customer centricity is a practice and a philosophy of all staff, not just the sales staff.
- Better relationship management and communication – These skills are expected to be increasingly important to compete and conduct business internationally with high value customers (particularly in the Asian market).
- Technology – Having a workforce with the technical, functional and business skills to use Information and Communications Technology (ICT) strategically to support business activities, reduce service delivery costs, and improve productivity and profitability, particularly picking up on opportunities emerging through social media, mobile technologies, cloud computing and data analytics.
- Managing diversity – Capitalising on the innovation that emerges when businesses have a diverse workforce, including people from different generations and different socioeconomic and cultural backgrounds. Leaders and managers need the skills to provide career and development opportunities for different groups, to implement systems to transfer knowledge across different parts of the organisation, to identify and cultivate multiple perspectives, and create an environment of collaboration. They also need to embrace two-way communication, including skills in listening and providing feedback.
- First-time managers – Investing adequately in training and skilling people to take on a first-time leadership role to ensure these people are supported to be successful. This is expected to reduce staff churn and improve productivity.
- Short, sharp approaches – Supporting time-poor small businesses, including freelancers, to keep up with the depth and breadth of knowledge they need to have in a fast-moving environment, particularly in understanding changes in technology and developing their general business planning skills as well as keeping on top of legislative and regulatory changes. This may require short, sharp approaches such as skill sets that can be tailored to meet specific workforce and skill requirements and specialisations, rather than always promoting full qualifications.

Business Services qualifications are not just used in the Business Services industry. Managers and clerical and administrative workers are employed across the economy and make up a large proportion of the Australian workforce. The skill development priorities outlined above also apply to managers, clerical and administration workers employed in other industries.

Industry intelligence

Companies in the Business Services industry provide professional assistance to other businesses, such as strategic and technical advice, advertising, recruitment and administrative services. Since the early 1990s, specialist business services have been increasingly contracted to undertake activities that had previously been conducted in house. This outsourcing has enabled firms across the economy to lower the cost of ancillary services and better focus on their core expertise.

The Business Services industry

A wide range of businesses can be classified as business services, and definitions of the industry vary. For the purposes of this Escan, we have focused on five key sectors within the industry that are heavy users of the VET system. They are:

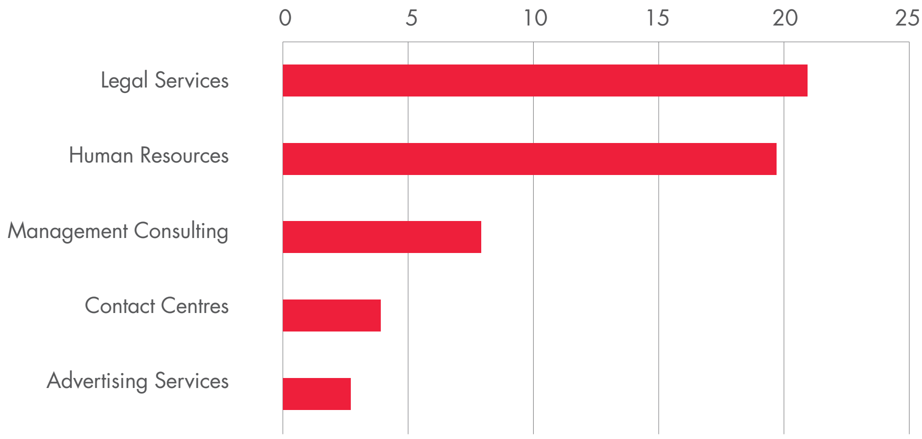
- legal services
- employment services
- management consulting
- contact centres, and
- advertising services, including public relations and market research and statistical services.

ICT and financial services, such as accounting services are two other key professional services provided to other businesses. These sectors are also strong users of the VET system; however, as significant industries in their own right, they are covered by separate IBSA industry Escans – Information and Communications Technology and Financial Services. Similarly, the rental, hiring and real estate services sector is often included in definitions of the Business Services industry, but these businesses are picked up in an Escan prepared by the Construction and Property Services Industry Skills Council.[1]

There is significant variation across the five sectors in the Business Services industry in terms of size, structure, and employment levels. However, there are common features too. All business services depend strongly on the quality of the people they employ to provide the services; brand recognition and customer service are critical for differentiating services; and because Business Services rely on the level of outsourcing of other businesses, the fortunes of each of these sectors is strongly linked to the state of the economy and business confidence.

Among the five sectors, the legal services and employment services sectors

Figure 1: Business Services – revenue generated 2012–13 ($bn)



Source: IBISWorld, Industry Reports: X0017: Call Centre Operation in Australia, September 2012; N7212: Temporary Staff Services in Australia, December 2012; N7211: Employment Placement and Recruitment Services in Australia, March 2012; M6962b: Public Relations Services in Australia, December 2012; M6962a: Management Consultants in Australia, February 2013; M6941: Advertising Agencies in Australia, February 2013; M6931: Legal Services in Australia, February 2013; M6950: Market Research and Statistical Services in Australia, November 2012.

1 For information about the outlook for ICT and financial services, see www.ibsa.org.au/environment-scan-escan. For information about the outlook for rental, hiring and real estate services, see www.cpsisc.com.au.

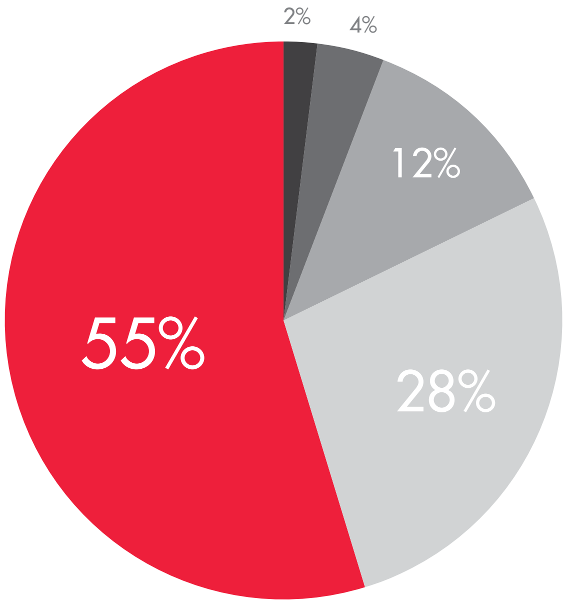
dominate the industry in terms of revenue generated – see Figure 1. The five sectors combined generated an income of $55.3 billion in 2013, accounting for about 1.8 percent of total Australian industry income[2].

It is estimated there are approximately 33,790 businesses in the industry, with the legal services sector accounting for over half of these businesses, and the employment services sector accounting for over a quarter of businesses – see Figure 2 (right).

The businesses tend to be concentrated in the capital cities, thus New South Wales and Victoria dominate the geographic spread of the industry, with about two thirds or more of businesses being located in these states. The main exceptions are contact centres, which are increasingly being hosted in Queensland, up 26 percent in 2012 from 17 percent in 2011, and temporary staff services businesses, which are more widely spread across the country, broadly in line with the population share in each state.

Over the last five years employment growth has been strongest in the employment services sector, led by a thriving permanent employment placement and recruitment segment. Employment in the advertising services sector has been variable. Public relations companies have experienced strong employment growth, while advertising companies have been shedding jobs. After a dramatic drop in employment in 2011, job numbers in the contact centre sector are beginning to grow again – see Figure 3 (overleaf).

Figure 2: Business Services sectors: Number of businesses



- 2% Contact Centres
- 4% Advertising, market research and public relations
- 12% Management Consulting
- 28% Employment Services
- 55% Legal Services

Source: IBISWorld, Industry Reports: X0017: Call Centre Operation in Australia, September 2012; N7212: Temporary Staff Services in Australia, December 2012; L7211: Employment Placement and Recruitment Services in Australia, March 2012; M6962b: Public Relations Services in Australia, December 2012; M6962a: Management Consultants in Australia, February 2013; M6941: Advertising Agencies in Australia, February 2013; M6931: Legal Services in Australia, February 2013; M6950: Market Research and Statistical Services in Australia, November 2012.

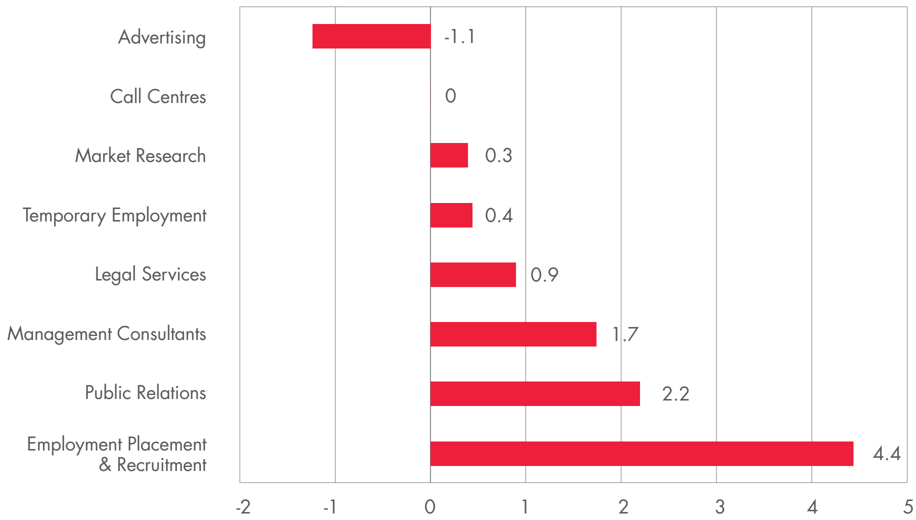
2 ABS, 2012, Australian Industry, 2011-12.

The Business Services industry is becoming increasingly important in the Australian economy due to ongoing increases in outsourcing, advances in technology and mining industry activities.[3] Employment services companies have been deriving the most benefit from the ongoing labour demand in the mining industry. Management consulting and legal services have also profited – see Figure 4.

Compared with other service industries – such as tourism and education – Australia's Business Services industry is not especially trade exposed, with most firms neither exporting nor facing a high degree of import competition. However, some activities are more exposed than others and the tradability of these Business Services appears to be rising over time. Currently, the most trade-exposed part of the industry is the professional services. Exports and imports of legal and consulting services in particular have been rising.[4]

The products and services and economic outlook for each sector are discussed in more detail below. Data is drawn from the latest IBISWorld industry reports, unless otherwise referenced.

Figure 3: Business Services sectors – Annual employment growth 2008–13 (%)



Source: IBISWorld, Industry Reports: X0017: Call Centre Operation in Australia, September 2012; N7212: Temporary Staff Services in Australia, December 2012; L7211: Employment Placement and Recruitment Services in Australia, March 2012; M6962b: Public Relations Services in Australia, December 2012; M6962a: Management Consultants in Australia, February 2013; M6941: Advertising Agencies in Australia, February 2013; M6931: Legal Services in Australia, February 2013; M6950: Market Research and Statistical Services in Australia, November 2012.

Legal services

The legal services sector includes solicitors and barristers (public and private) and legal aid services, as well as notary, conveyancing and patent services offered by lawyers. The sector is large and growing, with over 18,000 businesses in Australia offering legal services.

Commercial law brings in the most revenue to the sector. Legal advice to businesses raised $7 billion in revenue in 2013. This segment has been growing and is currently capitalising on work emerging from the energy and resources sector, as well as ongoing insolvency and restructuring work in the wake of the global financial downturn. Personal and family law is the next largest segment, accounting for over $4 billion in revenue. This includes work related to personal injury, workers, family law, wills and estates, much of which is handled by the smaller firms. Property law is the other key revenue stream for the sector, accounting for about $3.5 billion in 2013. The other key segments, in order of size, are administrative and constitutional law, community legal services, industrial and workplace relations, intellectual property law, and criminal law.

Major clients for the industry are corporate and business clients, particularly those in the banking, finance and insurance industries, which are highly regulated and offer complex products. However, demand for services is widespread across the economy, coming from all types of businesses, as well as households and governments. Legal services establishments are located all over Australia, but New South Wales and Victoria host more than their population share with most of the large firms based in Sydney and Melbourne.

Growth in the sector over the next five years is expected to be more subdued than that prior to the financial downturn, as businesses remain cautious and demand value for money. Downward price pressures may lead to better management practices by legal firms. Industry revenue is forecast by IBISWorld to increase by an average of 3.1 percent annually to 2017–18. Large firms have been, and are expected to continue pushing into the international arena, chasing the large markets in the United States (US) and the Asia Pacific. These large firms are also increasingly offshoring straightforward process work to lower cost jurisdictions.[5]

The next few years is expected to bring revenue and staffing reductions across the sector due to business uncertainty, more businesses choosing to use in-house counsel, less readiness by clients to litigate, and the internet allowing people help themselves on legislative issues. Commentators say salaries may not be as high as the industry has come to expect and firms are expected to be more innovative and clever in how they manage work and communicate to clients to deal with emerging challenges.[6]

3 Manalo and Orsmond, 2013, The Business Services Sector.
4 Manalo and Orsmond, 2013, The Business Services Sector.
5 G. Thornton, 2011, Insights on the Legal Profession.
6 B. O'Gorman, 2013, 'Economic Pressures Squeezing Profession', Lawyers Weekly, 8 August 2013.

There are new opportunities emerging, however. The energy and resources sectors in particular offer strong growth opportunities for enterprising providers of business services.

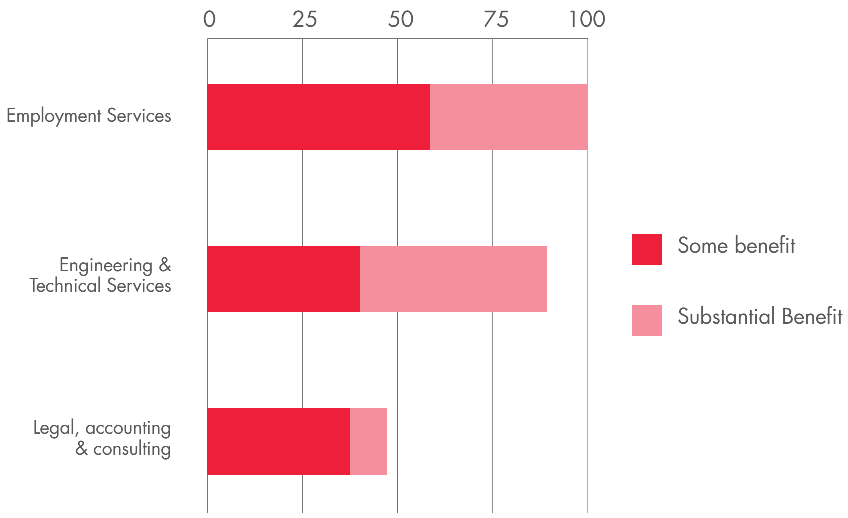
Employment services

The employment services sector is comprised of the employment placement and recruitment services segment, which accounts for over three quarters of the businesses in the sector, and the temporary staff services segment. The sector provides recruitment and screening of candidates for executive and general jobs, outsourced human resource functions encompassing recruitment, training, administration, workplace safety and strategy, as well as contract and labour hire services, temporary placement services, and placement of apprentices and trainees.

Employment outsourcing has become well established in Australia over the past two decades. Key clients for temporary staff services include: the mining industry, which often seeks temporary workers for mining projects in remote areas; wholesalers, who use temporary workers due to fluctuations in work volume; contact centres; banking and finance firms; government agencies; and organisations in the health industry, which are using temporary employment to quickly meet growing demand. Mining companies are also heavy users of permanent employment placement agencies. Finance, health services and other business services are the other key clients of permanent employment and recruitment services.

The sector grew strongly prior to mid-2008, fuelled by low unemployment and strong economic conditions. Growth hit a snag with the global financial downturn, resulting in a solid but brief downturn. The sector rebounded strongly from 2009–10. As the economy improves and unemployment remains relatively low, revenue growth in the permanent employment placement segment is expected to continue strengthening in 2013–14, with a forecast rise of 4.4 percent for the year. Revenue in the temporary staff services segment is expected to be a much lower 1.2 percent over the next five years, due to weaker growth in mining and energy sectors and weaker demand for commodities, generally due to slow global economic conditions. IBISWorld expects profit margins in both segments to remain thin due to high competition, including from business networking websites that offer a form of job matching. By 2017–18, it is expected that these online services may have 8–10 percent of market share for recruitment jobs in Australia.

Figure 4: Firms benefiting from the mining boom



Source: Reserve Bank of Australia, 2013, Bulletin – March Quarter 2013.

The trend for outsourcing low skill jobs to developing nations may have negative effects on employment services, particularly on the temporary staff services segment, as many of the staff supplied by this sector are for low skilled, labour intensive jobs. One avenue businesses may need to explore is to increase the focus on the training side of operations. This could potentially allow the industry to capitalise on areas of critical skills shortages.

The key to success for the more successful companies has been the development of close relationships with clients, maintenance of quality service, and assurance of each client's continued satisfaction with customer service and results achieved. This attention to 'customer centricity' allows businesses to differentiate their offerings. They may also need to focus on organisational and leadership capability. This is expected to require understanding and skills in business analytics, business insights, organisational design, and organisational development based on data and workforce planning.

Management consulting

Management consultants provide advice and assistance to other organisations on management issues including strategic and organisational planning, financial planning, marketing and human resources. Since the late 1990s, businesses and governments have employed an increasing number of consultants as the outsourcing trend has taken hold. Outsourcing of advisory services and other sporadically required work has become a recognised means of cutting costs and stimulating growth.

IBISWorld predicts that Australian businesses are expected to continue to use consultants to understand new trends and receive strategic advice and insight over the next five years, and as a result, the management consulting sector is expected to grow by an annual rate of 4.4 percent over the next five years through to 2017–18, to be worth $10 billion.

Management consulting is a high skill, high-charging sector and traditionally firms have competed on skills rather than price. However, increasing competition and overlap in service offerings is likely to increase price pressure and could force down fees in coming years.

A focus on service quality and helping clients to implement the recommendations are growing emphases in the sector. Four large international companies – 'the big four' – dominate the sector and continue to seek out new income streams and acquire other companies in order to offer a broader range of services. However, there is still room in the sector for high numbers of small, specialist consultants that provide quality service and expertise in niche areas. These smaller consultancies may also be looking to broaden their offerings to meet the market need and may choose to form alliances with other small, specialised firms, rather than carry the significant overhead costs associated with employing more staff.

Global industry analysts, Plunkett Research, have identified the following five key opportunities for the management consulting sector in the medium term:

1. Continued growth in health care expenditures and significant changes in health care coverage are creating demand, particularly for projects related to digital health records and greater efficiency and cost control.
2. Firms that focus on projects that clearly reduce business costs and enhance operating ratios in a reasonably short period are expected to be in demand.
3. New government regulation may create numerous opportunities for consultants who can show companies how to navigate rapidly changing relationships between government and certain industries, or deal with government oversight, particularly in financial services and health care.
4. Consultants who assist firms in lowering employee benefits and costs are expected to benefit.
5. Consultants and advisors in the fields of corporate expansion into emerging markets, information technology, mergers and acquisitions are expected to be in demand.

The move towards providing advice on ICT solutions is the other great shift to occur in the industry in recent years. At one point, ICT consultancy and management consultancy were distinctly different business propositions. However, ICT skills have become critical in implementing strategic or change management processes. Plunkett research notes that the biggest opportunities for ICT consulting growth are expected in three areas – (a) big data, (b) cloud-based infrastructure, and (c) mobile apps and data services.[8] More on trends in ICT strategy is provided in IBSA's Information and Communications Technology Industry Escan 2014.[9]

Contact centres

Contact centres interact with customers or the general public on behalf of clients via telephone or another technology interface. They may be engaged to promote a client's products and services, solicit contributions, or provide

7 Law Society of NSW (2011) *National Profile Final Report*
8 Plunkett Research, 2013, Introduction to the Consulting Industry.
9 See http://www.ibsa.org.au/environment-scan-escan

information, technical assistance or other forms of customer support. Most of the revenue in the sector comes from customer care or relationship management, as businesses are investing more in ensuring that customer concerns are dealt with effectively.

The major clients for the sector are organisations within the telecommunications, finance and insurance, health care and government industries. These industries require a high level of customer interaction, both pre- and post-sale of their products and services. Retailers are also increasing their use of contact centres with the transition to online shopping, resulting in a growing need for customer service support.

Profitability in this sector has been severely affected by competition from overseas operations. Offshore contact centres in developing countries benefit from much lower labour costs, which allow them to offer services for dramatically lower fees than the domestic operators can offer. The strengthening Australian dollar also made overseas services more attractive to clients. Small contact centre operators have been hardest hit because they have lacked the scale to compete or offer additional services. This has led to contraction and consolidation in the sector. Another challenge has been the increase in consumer skills in undertaking web-based research and troubleshooting their own issues with products. This shift has weakened demand for contact centres that provide technical assistance. Gartner claims that by 2020 the customer may manage 85 percent of the relationship with an enterprise without interacting with a human.[10]

Despite recent challenges, the industry is expected to grow 1.9 percent per annum over the five years through 2017–18 to a total of $4.3 billion. IBISWorld anticipates that 2013–14 is expected to be a particularly strong year, with industry revenue expected to increase by 6.6 percent, a stronger performance than that expected of the overall economy.

This sector is particularly dependent on technology. Gaining access to new technology is a key competitive strategy for contact centres. As voice-responsive technology improves, web-enabled centres are expected to become more cost effective and user friendly, displacing call centre employees, but providing new opportunities for operators. Currently, US research indicates that 25 percent of consumers use one or two channels, eg phone, email, web service, or chat, when seeking customer care and 52 percent of consumers use three or four channels.[11] Customers expect to be able to interact with companies through multiple technologies. Speech analytics is one of the top new technologies being used by the sector. Speech analytics can be used to measure and interpret speech content, including the emotional character of speech, tone, inflections, pauses and cross talk, to extract business intelligence.

Working from home is becoming more popular in the sector as a way of offering employees more flexibility and opening up the labour pool to employers. US data indicates that over half the contact centres have some of their staff functioning from a home office and most of these contact centres plan on increasing their number of at home staff.[12]

Advertising services (including public relations, market research and statistical services)

The advertising services sector combines three relatively small segments, each with about 400–500 businesses in Australia. These businesses are concentrated in New South Wales and Victoria, where clients' corporate offices tend to be located, particularly major clients in the banking and finance industries. Advertising agencies make up the largest of the three segments, with annual revenue of $1.2 billion, closely followed by market research companies with revenue of $1.1 billion. The other segment, public relations, generated about half a billion in 2012–13.

All three segments are concerned with helping businesses understand and communicate better with their clients. Advertising agencies tend to use broadcasting and print media, billboards and the internet to promote

10 A. Marsh, 2013, 40 Stats Shaping the Future of the Contact Centre Industry.
11 Ibid
12 Ibid

a client's products or services. Market research companies conduct opinion polls and qualitative and quantitative research to help clients understand the opinions of targeted consumer groups. Public relations (PR) firms manage the communication between a client and its stakeholders in a way that promotes the client's image and interests, including through media monitoring, press releases, public appearances, web pages, social media and special events.

There is overlap between the segments. Many PR firms are owned by advertising agencies or work closely with them in creating integrated marketing and promotional campaigns. Advertising agencies are primary users of market research services as the data is often used in the development of advertising strategies. There is an overall trend of integration between the segments. Advertisers have been merging with public relations agencies and market research firms to become one-stop marketing and communication shops.

Budgets for these services expand when revenue is strong and cash is readily available and business contracts when the economy weakens. All segments suffered with the global financial downturn, however. Public relations and market research segments are back into an expansion phase and are expected to grow at an annual rate of 2.6–2.7 percent to 2017. Advertising agencies were more severely affected by the downturn and revenue for this segment is still declining due to the high cost of media advertising and the fragmentation of consumer media viewing habits. Over the five years through 2017–18, advertising revenue is expected to increase a modest 1 percent annually.

Public relations

In recent years, an increasing proportion of marketing budgets are being allocated away from traditional advertising towards public relations (PR). This is because audiences have become harder to reach. More targeted, 'below the line' methods of communication are seen to be more effective in gaining audience attention. Social media, such as blogs, discussion forums, video-sharing and social networking websites, has become a key avenue for PR communications. The PR segment has benefited from political party expenditure in campaigns leading up to the 2013 election. Sports and special events marketing and promotions also provide strong sources of revenue. Increasing communication about environmental issues, including carbon reduction strategies, is expected to be a major new area of work for the industry in coming years. PR companies may also need to continue to develop new approaches as consumers change their media habits, including increasing use of YouTube, Facebook, interactive television (TV) and Short Message Service. Measuring success is becoming more important to clients. Monitoring and accountability may need to be built into all PR approaches.

Advertising

Despite increasing competition with public relations companies, the advertising agency segment is expected to benefit in coming years from strong increases in the use of pay TV and the internet. Advertising agencies have been moving online for some years, in response to the fact that more and more people are consuming their media online and that Australians are more accepting of online advertising than they are advertising breaks on TV. It is estimated that online advertising spending increased more than six-fold between 2004 and 2011. IBISWorld forecasts that spending on online advertising may rise to account for about 18 percent of total media advertising spending by 2017–18, up from an estimated 13 percent in 2012–13. Media fragmentation is also driving the need for integrated campaigns to ensure messages get picked up by different audiences. Another key trend in the industry is the move towards fixed fees combined with results-based payments by clients. This has been made possible due to advances in measurement of advertising effectiveness. Like clients of public relations firms, clients of advertisers are increasingly demanding accountability and value for money.

Market research

As advertising agencies are a major client of market research services, these services are expected to benefit when advertising picks up. The market research segment may also continue to face challenges and opportunities due to the growth of online media. Clients are looking to market research services to garner information on audience numbers and advertising effectiveness of these media. Services, therefore, need to be able to innovate to develop the measurement systems that provide the

data clients need, including technology that tracks comments made by consumers and provides attitudinal and behavioural information, not just simple demographic information. The market research segment may face external competition from information technology specialists in offering these tracking and measurement systems.

This segment is also moving towards providing advice to businesses to solve information problems, leading to improvements in the decision-making processes of companies. In this area, market researchers are expected to face external competition from specialists offering similar services such as management consultants. Leading market research companies are expected to devote considerable resources to ongoing staff training and the development of specialist skills and knowledge over time. A loyal, satisfied customer base is also a key to future success.

Workforce characteristics and employment trends

There are marked differences between the various sectors of the Business Services industry in terms of employment share. Professional, scientific and technical services, which include legal services and management consultants, have been increasing employment share; while administrative and support services, which include contact centres and employment services, have remained steady; and media and telecommunication, which includes advertising, has seen a slight decline in employment over the last five years – see Figure 5 (overleaf).

This picture is fairly consistent when we look just at the sectors covered by this Escan. Management consulting and legal services, which employ high numbers of professional staff, have grown in terms of employment numbers in the last three years; while advertising, market research and employment services have been steady or declined slightly in employment.

According to the Reserve Bank of Australia, employment trends within broader Business Services reflect four interrelated factors: (a) the growth of the mining industry; (b) the trend increase in the demand for the output of skilled labour within the economy; (c) the increased use of outsourcing by firms to acquire business services inputs; and (d) technological developments.[13] The impact of these factors on specific enterprises within the Business Services industry has varied, with some of these factors important for an extended period while others have been more recent phenomena.

Looking at where people in the industry are employed by state and territory provides evidence of the impact of the mining industry. Western Australia and Queensland have more than their population share of jobs in employment services. This reflects the heavy use of these services, particularly temporary staff services by mining, oil and gas, engineering transport and construction companies.

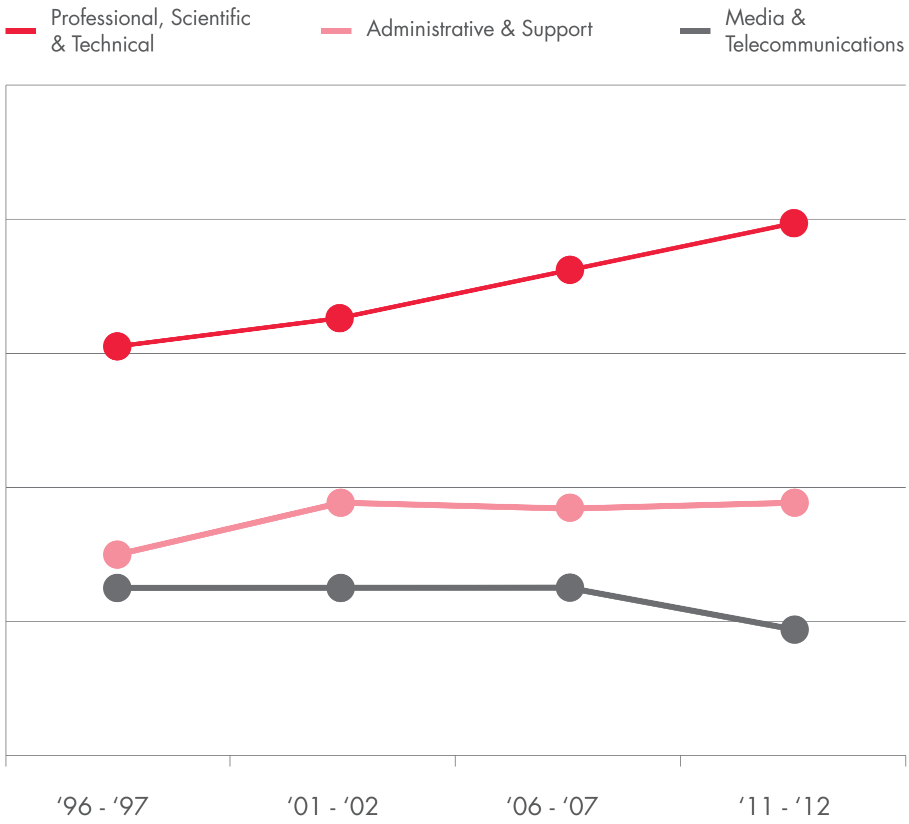
In Western Australia, employment in administration and support services grew by 35 percent over the last five years. The only industries that recorded stronger employment growth in this state were mining and electricity, gas, water and waste. In the Northern Territory, jobs in administrative and support services also grew strongly, only outdone by mining.

From a national perspective, however, growth in administrative and support jobs has not been particularly outstanding at seventh-fastest growing out of ten sectors. The Department of Employment expects it to be the slowest growing sector over the next five years, requiring only 26,000 new jobs. The professional, scientific and technical services area is projected to require 63,000 new jobs. A proportion of these are expected in the Business Services sectors of management consulting and legal services[14].

Twenty years ago clerical and administrative workers were on par with professionals, being the largest two occupational groups and accounting for 17.3 percent of national employment each. Today, clerical and administrative workers make up 14.7 percent of national employment, while professionals are the largest occupational group, accounting for 22.3 percent. In terms of specific occupations, however, general clerks and receptionists are amongst the largest five, employing 217,000 and 182,000

13 Manalo & Orsmond (2013) The Business Services Sector
14 Connelly, B. (2012) "Almost 30 per cent of enterprises budgeting for the cloud; Connection Research", *CIO Magazine*

Figure 5: Business Services Employment Share (%)



Source: Reserve Bank of Australia, 2013, Bulletin – March Quarter 2013.

people respectively. General clerks also recorded the largest number of new jobs of all occupations, namely 74,500 over the five years to November 2012[15].

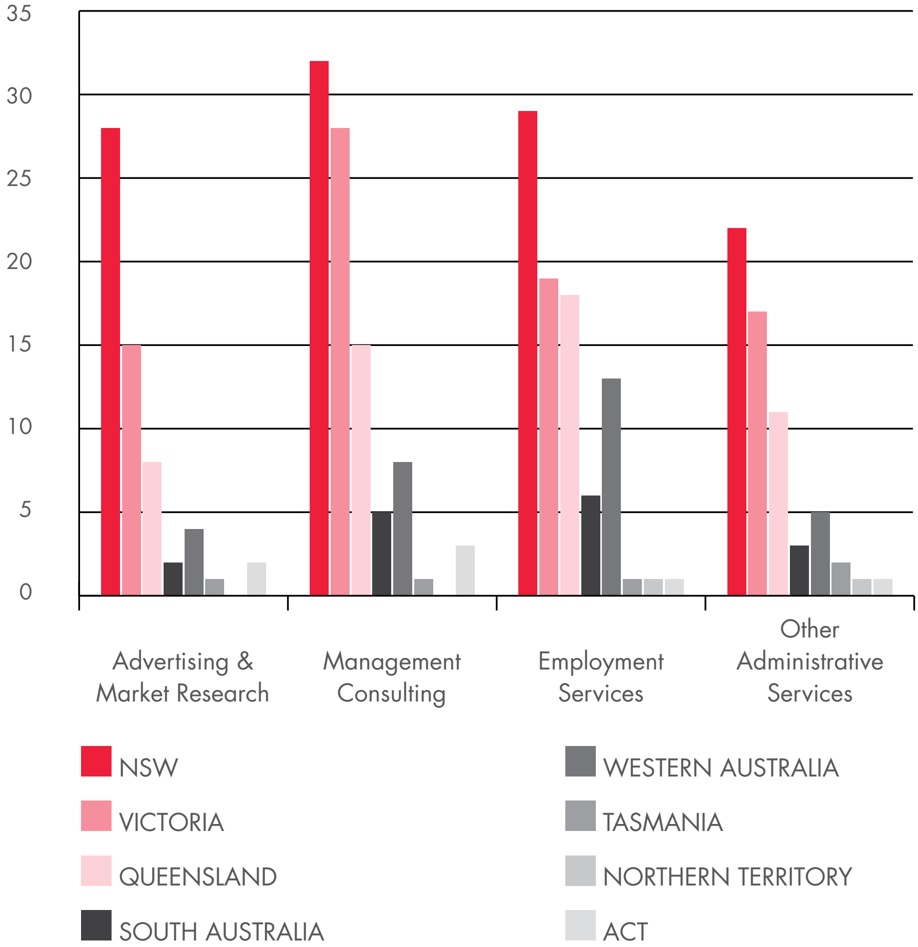
Clerks and receptionists dominate the Business Services industry. However, these occupations are not just employed in Business Services industry sectors; they are employed in high numbers in all industries.

Other large employing occupations in the industry are office managers, advertising and sales managers and contract program and project administrators. Together, these five occupations employ 770,000 people across the economy and are prevalent in a wide range of industries.

Business Services is a highly feminised industry. Although there are still slightly more men than women employed in the management consulting sector, there are equal numbers in advertising; and women significantly outweigh men in legal services, employment services and contact centres. Some of the higher paying professions in the industry, including barristers, management and organisation analysts, and most types of managers apart from office managers and Human Resources (HR) managers, remain male-dominated professions, while many of the lower paying jobs, such as sales assistants, receptionists and contact centre workers, are filled mostly by women.

15 DEEWR, 2013, Australian Jobs 2013.

Figure 6: Business Services employment by industry and state/territory, 2013 ('000)



Source: ABS, 2013, Labour Force, Australia, Detailed, Quarterly, cat. no. 6291.0.55.003, May 2013; SuperTABLE E06_aug94 – Persons Employed by Sex, Industry (3 digit), State, Status in Employment, August 1994 onwards.
Note: Legal services employment data was not available by state and territory.

Table 1: Total persons employed in Business Services industries by industry, 2010–13 ('000)

ANZIC	SECTOR	2010	2011	2012	2013	INDUSTRY % 2013
693	Legal services	97	97	99	100	25%
694	Advertising services	29	33	35	32	8.0%
695	Market research and statistical services (including contact centres)	31	31	38	29	7.2%
696	Management and related consulting services	73	79	78	91	22.7%
721	Employment services	89	93	101	88	21.9%
729	TOTAL FOR INDUSTRY	380	395	413	401	100%

Source ABS, 2013, Labour Force, Australia, Detailed, Quarterly, cat. no. 6291.0.55.003, May 2013; SuperTABLE E06_aug94 – Persons Employed by Sex, Industry (3 digit), State, Status in Employment, August 1994 onwards; IBISWorld, 2013, Industry Report M6931: Legal Services in Australia, February 2013.

Table 2: Top 20 occupations in Business Services industry by state/territory ('000)

ANZCO	OCCUPATION	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	TOTAL
531100	Clerks, general	71	43	57	14	18	4	4	7	217
542100	Receptionists	58	46	35	12	24	4	2	3	182
512100	Managers, office	42	29	29	8	14	3	2	4	131
131100	Managers, advertising and sales	48	35	20	7	12	2	1	2	125
511100	Contract, program and project administrators	31	28	25	8	12	2	2	8	115
591100	Clerks, purchasing and supply logistics	27	24	16	5	11	1	1	1	86
521200	Secretaries	24	17	13	5	9	1	0	1	70
541200	Clerks, inquiry	23	18	12	5	7	2	1	1	67
271300	Solicitors	23	17	12	3	5	1	1	2	64
223100	Human resource professionals	18	14	12	3	8	1	1	2	58
532100	Keyboard operators	20	17	9	4	4	2	1	1	57
133500	Managers, production	14	18	12	4	8	1	0	0	57
224700	Management and organisation analysts	19	20	8	3	5	1	0	2	56
225100	Advertising and marketing professionals	20	18	9	2	3	1	0	1	52
111200	Managers, general	16	13	10	3	7	1	1	1	52
132300	Managers, human resource	16	13	7	3	7	1	1	1	49

Table 2: Top 20 occupations in Business Services industry by state/territory ('000) (cont.)

ANZCO	OCCUPTATION	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	TOTAL
133600	Managers, supply and distribution	14	11	7	2	5	1	0	1	41
149200	Managers, call, contact centre and customer Service	13	11	7	2	3	1	0	0	37
591200	Clerks, transport and dispatch	13	9	7	2	4	0	0	0	36
541100	Call or contact centre workers	10	9	6	2	2	2	0	0	31

Source ABS, 2013, Labour Force, Australia, Detailed, Quarterly, cat. no. 6291.0.55.003, May 2013; Super TABLE E08_aug94 – Persons Employed by Sex, Occupation, State, Status in Employment, August 1996 onwards.

Industry and workforce outlook

Industry outlook

The future holds opportunities and challenges for Business Services. According to the 2013 Chief Executive Officer (CEO) survey by the Australian Industry Group (AiG), the business environment is challenging at the moment, with businesses focusing on keeping operating costs down. However, the news is not all bad for Business Services. Many businesses across the economy are planning to invest in market development as part of their growth strategies, which bodes well for Business Services involved in market research. Contact centres, consultants and legal services may also benefit from these activities. Table 3 describes the strategies different industries are planning to implement in 2013.

The 72 Australian CEOs surveyed by AiG from the wider services sector revealed that they are most concerned about the impact of the following three factors on business growth:

- lack of customer demand (22 percent)
- wage pressures (15 percent), and
- complying with government regulations is (14 percent).[16]

Those business services that can respond to these challenges are expected to do well in coming years.

In summary, the following trends appear to be having the most significant impact on the Business Services industry:

- Offshoring – while AiG's CEOs Survey indicates that sourcing inputs offshore is not currently high on the agenda as a growth strategy, the continuing drive for increased efficiency in the face of strong competitive pressures, as well as advances in communication technologies and skill shortages in Australia, have underpinned longer-term efforts to shift parts of the internal operations of some Business Services firms offshore. This trend particularly affects larger firms, which are continuing to shift to back-office, process-style jobs offshore while keeping higher skilled, more complex jobs in Australia.
- Negative global economic environment – competition from imports and the high Australian dollar may impact on the trade-exposed part of the industry. There are both positive and negative impacts of the high dollar on the industry. Businesses that import consumer goods and business inputs are expected to benefit. However, those that export their services and/or compete with overseas companies domestically may face challenges.
- Technological developments – a number of technology trends influence the sector. For example, the cloud is expected to increasingly be used as businesses become more convinced that their data is safe. Mobile devices may be used progressively more as business tools. 'Gamification' – the application of game design concepts to non-game environments to inspire deeper engagement and to reward behaviour – is becoming a common way to communicate, engage and train. The use of software that integrates various social media platforms for use in daily business processes is expected to enhance and extend internal and external collaboration. Big data analytics is expected to be used more to help businesses understand their clients and forecast more accurately.[17]
- Mining industry changes – the shift from the investment to the production phase of the mining boom is likely to see ongoing changes in the nature of the demand for business services. For example, employment services firms may derive less benefit since the move from the investment to the production phase of the mining boom requires a more permanent and generally smaller workforce[18]. Mining is also facing a new era of cost focus and cost cutting and operators may be looking to increase productivity through business and performance analysis[19]. This may present opportunities for legal services and management consultants working in the field.
- Deeper global engagement – larger business services are already working closely through partnerships and collaborations with overseas companies, particularly in Asia. This is expected to continue as Australian businesses recognise new opportunities in emerging markets and are supported by government to integrate more with Asia. Over the past 20 years, China and India have more than doubled their share of the global economy. The size of China's economy has expanded nearly 10 times in that period and India's has grown 5.5 times, both in purchasing power and parity terms.[20] With an expanding middle class in Asia, particularly in China, new markets are being created for business services.

Workforce and employment outlook

The Business Services workforce is expected to continue to expand in coming years. Forecasts indicate workforce increases in all sectors. Management consultants and contact centres are expected to expand the most in the next five years. In terms of numbers of new employees, excluding the temporary staff services sector (because the employment numbers reflect the staff firms employ for use by other industries), legal services are expected to hire the most new workers over the next five years (8,574), followed by contact centres (5,515).

Professional jobs are expected to be most in demand in the next five years. Already 3.4 million Australian workers are employed in an occupation assessed at Skill Level 1, which is equivalent to a Bachelor degree or higher qualification. Close behind, however, are occupations at Skill Level 2 and Skill Level 3, which are equivalent to a vocational education and training qualification at the Certificate III or higher level. These jobs account for slightly more than 3 million workers.

In the Business Services industry, occupations requiring high level skills, such as solicitors, legal executives, and training and development professionals, are expected to be in highest demand. DEEWR predicts corporate managers, especially corporate services managers and advertising and sales managers, to be among the strongest growing occupations in the workforce.[21]

16 IBIS World (2012) *From the desk of Phil Ruthven, Where's the productivity problem?*
17 Sheehan, P. (2012) 'Investments are nearing their peak, but the mining boom isn't over yet' in *Mining Australia*
18 Manalo and Orsmond, 2013, The Business Services Sector.
19 KordeMentha, 2013, Mining Services: Riding the Crest of the Mining Boom.
20 Austrade, 2013, Why Australia: Benchmark Report Update June 2013.
21 DEEWR, 2013, Australian Jobs 2013.

Table 3: Forecast employment growth in Business Services sectors, 2012–18

SECTOR	EMPLOYMENT 2012–13	FORECAST EMPLOYMENT 2017–18	FORECAST EMPLOYMENT GROWTH 2013–18
Management consultants	35,669	39,073	9.5%
Contact centres	59,491	65,006	9.3%
Public relations	4,253	4,636	9.0%
Legal services	100,066	108,640	8.6%
Market research and statistical services	15,100	16,200	7.3%
Temporary staff services	331,600	346,600	4.5%
Employment placement services	22,200	23,300	4.9%
Advertising agencies	9,500	9,900	4.2%

Source: IBISWorld, Industry Reports: X0017: Call Centre Operation in Australia, September 2012; N7212: Temporary Staff Services in Australia, December 2012; N7211: Employment Placement and Recruitment Services in Australia, March 2012; M6962b: Public Relations Services in Australia, December 2012; M6962a: Management Consultants in Australia, February 2013; M6941: Advertising Agencies in Australia, February 2013; M6931: Legal Services in Australia, February 2013; M6950: Market Research and Statistical Services in Australia, November 2012.

At Skill Level 1 or 2, DEEWR's forecasts indicate that the largest numbers of new jobs in the business services industry may be for:

- managers, advertising and sales – Skill Level 1 (21,100)
- contract, program and project administrators – Skill Level 2 (17,100), and
- managers, office – Skill Level 2 (16,200).

At Skill Level 3 the largest numbers of new jobs in the Business Services industry are likely to be for call or contact centre workers with 6,600. For lower skilled jobs at Skill Levels 4 or 5, the largest numbers of new jobs are expected to be for receptionists with 18,500 and inquiry clerks with 14,800.[22]

Some of the key workforce trends impacting on each Business Services sector are highlighted below, including what types of attributes the workforce may need to support organisations in becoming more efficient, productive and competitive into the future.

Legal services

Legal firms are increasingly taking up a new model of service delivery, known as legal process outsourcing (LPO). Outsourcing transfers low-level, routine legal processes to external vendors located domestically and overseas. Legal process outsourcing, both onshore and offshore, is transforming legal workplaces as law firms seek to minimise costs, increase flexibility and expand their specialist and strategic level services.[23]

Work/life balance is becoming more important in the legal services sector. Workplace policies such as flex time, telecommuting, part time work, phased retirement, temporary leave, and other alternative work arrangements are bringing flexibility to the law firm environment. Virtual lawyers, legal assistants and paralegals are emerging as an alternative that permit flexible work hours and foster a better work/life balance for workers in the sector.[24]

Management consultants

As consultants seek to meet client expectations for a broader range of services and assistance in implementing their recommendations, it may be more important for them to form alliances with other firms and contingent workers. Australia's contingent workforce is increasing as people choose more flexible ways of working. A blended workforce can help consultants meet the new demands of clients. Organisations need to understand the risks and benefits and have effective strategies to engage and manage their contingent workforce.

22 Ibid.
23 Kane, 2013, 10 Trends Reshaping the Legal Industry.
24 Ibid.

Mobile technologies are making it easier for workers to get things done away from the office, but the quality of the personal connection is expected to remain important in this industry as it has a direct effect on the project output.[25]

Employment services

As organisations attempt to further improve their attraction and retention strategies to increase staff engagement and productivity, strong 'talent managers' are expected to be in demand.[26] Productivity drives may also have an impact on human resources operating models. Cost minimisation is expected to be important, including the use of technology to automate various people processes.[27]

Increasing numbers of contingent workers in the labour force may also have impact on employment service practices. HR practitioners who can capitalise on and harness the power of the new extended workforce are expected to position their companies to gain unique advantages. Workers in this sector are expected to have strong analytics capacity to identify different talent pools and markets, and to mine and analyse different data available about potential employees.[28]

The stronger workplace health and safety legislation introduced in 2012 is expected to create demand for employment service organisations that can assist business, particularly small businesses, to meet their obligations in this area.

Contact centres

Understanding and making best use of technology is expected to continue to be important for the contact centre workforce. The increase in self-help options for customers means that contact centre workers may be receiving a proportionately higher number of complex and emotive enquiries. As customers' needs become more refined, their perception of the agent experience is anticipated to have a direct impact on the business outcome of the interaction.[29]

With the increase in channels used by contact centres (web, social media, SMS, apps, etc), more effort may need to be put into measuring use and costs. Workforce training and quality management is expected to be vitally important. According to the latest Global Contact Centre Benchmarking Report, mature organisations are taking a healthier attitude to upskilling staff and moving away from traditional activity based measures.[30]

Advertising services

Social networking has changed the way online advertising is done. There is expected to be a strong focus in coming years on finding staff with experience in the digital marketing space as well as implementing cloud solutions. Customer experience continues to be a major focus point for many organisations as they aim to gain a competitive advantage. This is expected to lead to demand for strategic, insight driven staff members.

Organisational culture, work/life balance and flexibility are important for candidates looking for work in this sector. Companies investing in training, flexible work environments and career development may be best placed to secure and retain top talent.[31]

Key impacts for the industry

Considering the changes occurring in the individual sectors, the four most significant impacts for the Business Services workforce are:

- Customer centricity – improving customer experience and satisfaction is critical to all sectors in this. As customers increasingly use self-help options to solve simple problems and routine processes are moved offshore, customer interactions have become proportionately more complex, requiring advanced relationship management skills. Customer focus is no longer enough. A 'customer centric' mindset is required. Customer centric individuals explore ways to satisfy the needs of their customers while delivering greater value and making it easier and a more

25 J. Kunzweiler, 2013, Consulting is a Contact Sport.
26 R. Walters, 2013, Salary Survey 2013.
27 Mason, 2013, HR Trends to Watch in 2013.
28 D. Gartside, Y. Silverstone, C. Farley, and S. Cantrell, 2013, The Rise of the Extended Workforce, Accenture.
29 K. Teasdale, 2013, Four challenges for customer self-service.
30 Ibid.
31 R. Walters, 2013, Salary Survey 2013.

enjoyable experience for their customers. They have the authority to solve challenges customers face on the spot, when they occur, and they see incremental sales as secondary to the degree to which customers have been satisfied.[32]

- Staff retention – Staff turnover is estimated to cost employers up to $1 million per annum but reducing churn by just 5 percent could result in a saving of $280,000 a year for every 100 people employed[33] Supporting employees at all levels to achieve balance pays a handsome dividend and is central to retaining and developing people. Balancing a flexible and adaptive approach in dealing with family, ageing and retirement and maternity/paternity with opportunities for career development is essential to ensuring the workplace is able to move with changing needs and expectations.[34]
- Harnessing the extended labour force – More than 30 percent of Australian based employers already regard temporary workers as a key component of their long-term staffing strategy and 54 percent of employers see temporary workers as an ideal way to bring a particular expertise on board.[35] The Business Services industry is beginning to rely more on contract workers, consultants and freelance workers to meet their business goals and respond to, skills gaps and a rapidly changing economic environment. Some business services are even beginning to draw on the human resources of their customers to create responsive products and services. Organisations face challenges in understanding what skills and services contingent workers provide, making decisions on whether to fill a role or skill need with a contingent worker or a full-time employee and how to implement integrated workforce strategies that make the most of the benefits and reduce the risks of using a contingent workforce.[36]
- Increasing demand for professionals – occupations involved in professional services are increasing their employment share, as businesses increasingly require higher level skills.

A list of Occupations in Demand is provided in Appendix B. The list is collated from industry intelligence presented in this Escan on the industry, employment trends and the workforce. This list contributes to workforce development and planning strategies highlighted in Chapter 3 and also presents a clear relationship to IBSA training packages.

This following occupations and job roles have been reported as in demand in the Business Services industry at IBSA's Escan 2013 industry consultations and validation:

- manager/supervisor
- frontline supervisor
- quality and compliance auditor
- manager – business development/strategy, and
- OH&S/WHS manager.

32 Finklestein, 2013, 'Customer-Centricity Takes Customer Focus to the Next Level – and Improves Loyalty and Profit', BRW, 29 May 2013.
33 Hays, 2013, Top 10 Talent Trends for 2013.
34 LMA, 2013, Leadership, Employment and Direction Survey.
35 Hays, 2013, Top 10 Talent Trends for 2013.
36 Deloitte, 2011, Contingent Workforce.

Identified workforce development needs

The following workforce development issues have been raised repeatedly in industry consultations and surveys and are also reflected in latest industry commentary and research.

Changing role of clerical and administrative workers

Business Services industry sectors employ large numbers of clerical and administrative workers. Clerical work is not static in nature and has seen major change over time with the advent of new technology and newer norms of work organisation and administration. Many managers now handle their own calendars and travel arrangements, computers now store files and cloud computing is replacing silos of data.

However, office and administrative workers are playing a greater role in other ways in today's businesses. These workers are now 'expected to perform like managers', and, according to a survey from the International Association of Administrative Professionals, 52 percent of assistants said they supported three or more people, rather than one manager.[37] About two thirds of all administrative professionals make and/or recommend purchasing decisions for their employers.[38]

Companies are expected to focus on engagement and training efforts to retain the best and brightest employees as they continue to play an increasingly integral role in companies. Particularly important are expected to be people with strong organisational skills and high level computer literacy to adapt to increasing use of technology. Keeping up with changing technology was the top choice when administrative professionals were asked to identify the most significant issue they and their colleagues face in the next five years.[39]

Customer service

Customer service has always been important to successful businesses. However, as noted above, clever organisations are shifting from focusing on making a sale to focusing on the whole customer experience. 'Customer centricity' takes customer service to a whole new level. A recent survey of consumers showed that even in a negative economy, customer experience is a high priority for consumers with 60 percent often or always paying more for a better experience and 89 percent of consumers starting business with a competitor following a poor customer experience.[40] According to the same survey, there are a number of tactics a business can use to woo a customer, but the number one tactic, rated by 73 percent of consumers surveyed, is having friendly employees or customer service representatives. In other words, hiring and empowering the right staff is the most critical element to successfully courting consumers.

Research on high performing workplaces in the Australian services sector shows that they truly strive for customer centricity. They:

- exert more effort trying to understand customer needs than low performing workplaces
- are curious to learn new things from customers and invest additional time and resources to this effect
- are better at acting on suggestions and feedback received from customers, and
- do whatever it takes to create value for customers, for example, by investing more resources in responding to customer needs and by exerting more effort to better service customers.[41]

The need for better customer service skills within the Business Services industry was a strong focus in IBSA consultations. Some stakeholders highlighted that social media has created an extra impetus to get customer relations right. Unflattering customer service reviews on Facebook or Twitter can spread quickly and be highly damaging for a brand. The need for project managers to have confidence and skills in working with customers was also highlighted – customer centricity needs to be a philosophy of the whole organisation, not just the sales staff.

Technology

ICT is a key resource in successful service-based businesses. High performing organisations use ICT strategically to support business activities, to reduce service delivery

37 PR Newswire, 2013, 'Confidence Among Office and Administrative Workers Hits 6-Year High'.
38 IAAP, 2013, Benchmarking Survey.
39 Ibid.
40 Harris Interactive, 2011, Customer Experience Impact Report.
41 UNSW, 2011, Leadership, Culture and Management Practices of High Performing Workplaces in Australia: The High Performing Workplaces Index.

costs, and to improve productivity and profitability. ICT supports an organisation's operational processes and reduces production costs by making information available and by connecting people within and beyond the organisation. It cannot be seen as an add-on. Strong alignment between business and ICT strategy and strategic and operational use of ICT is expected to reap rewards.[42]

A key new development in workplaces is the widespread adoption of mobile communications devices and the change this implies for many traditional workplaces. Workers can be 'at work' at any time, from any location, in an increasing number of jobs.[43] Mobile technology combined with the right software and applications has been shown to boost worker productivity in a range of industries, but also brings management challenges, in terms of supervising progress, maintaining work health and safety standards and ensuring work/life balance.[44] Social media is also becoming a critical tool for businesses, not just for promotional reasons, but also for internal communication and training and development. Having a workforce that can understand and make best use of mobile technology and social media may be a key for competitive business services companies, particularly with the roll out of the National Broadband Network (NBN) providing new opportunities for these technologies.

The skills and knowledge associated with ICT-enabled social technologies create significant value and research has found that, by adopting these technologies, companies could raise the productivity of knowledge workers by 20–25 percent. However, realising such gains may require significant transformations in management practices and organisational behaviour.[45]

Consultations with business services identified that skills in cloud computing security and management and use of big data analytics were key workforce development needs for the industry. AiG's 2013 CEO Survey found that businesses were facing impediments to adopting wireless and cloud technologies. The main impediments cited were security, intellectual property and privacy concerns, and business processes that have not kept pace with technological innovations.

There is still some way to go for most businesses to be equipped with the digital skills they require. A recent global survey of executives across a range of industries indicated that, at best, most companies are one quarter of the way toward realising the end-state vision for their digital programs. Respondents said the success (or failure) of digital programs ultimately relies on organisation and leadership, rather than technology considerations, including sourcing the technical, functional and business skills required.[46]

Working in a cross-cultural environment

Australia is expected to need to improve its development of relevant skills and develop new business models and new relationships to fully benefit from the rapid increases in Asian demand.[47] According to the Sustainability Council, Australia has one critical head start in the race for skilled people: it is very well placed to attract the world's most skilled and creative leaders, entrepreneurs, researchers and workers. Australia's modern economy and society, exceptional quality of life, strong education and tourism platforms, migration tradition and proximity to Asia add up to a unique opportunity for Australia's enterprises in Asia.

However, Australia may also need to grow our own expertise. To capitalise on this opportunity, the Australia in the Asian Century White Paper states that Australians may need to develop job-specific skills, scientific and technical excellence, adaptability and resilience and the ability to use creativity and design-based thinking to solve complex problems. We also need to broaden and deepen our understanding of Asian cultures and languages, to become more Asia literate so that our firms can develop collaborative relationships and connections with others in the region.[48]

42 Ibid.
43 BCA, 2013, Action Plan for Enduring Prosperity.
44 Eddy, 2012, Tablet, Smartphone Use Increasing Worker Productivity.
45 McKinsey Global Institute, 2012, The Social Economy: Unlocking Value and Productivity Through Social Technologies.
46 McKinsey, 2013, Bullish on Digital: McKinsey Global Survey Results.
47 National Sustainability Council, 2013, Sustainable Australia Report 2013.
48 Australian Government, 2012, Australia in the Asian Century White Paper.

Diversity

The Business Council of Australia, in its 2013 Action Plan for an Enduring Prosperity, noted there are a number of disadvantaged groups in the community where workforce participation rates remain particularly low. This includes people with disability, some migrants from non-English-speaking backgrounds, Indigenous Australians and people with low education and skills. The BCA points out that just increasing the participation of women with children and older Australians to world-leading rates could bring more than 700,000 workers into the labour market. Increasing the workforce participation of people who are able to work, including those who experience multiple disadvantages, is expected to improve Australia's productivity and contribute to greater social inclusion.[49]

There is a strong business case for individual organisations to focus on workforce diversity. Benefits for businesses include:

- increasing workforce capability and responding to the skills/talent shortage by being an employer of choice
- broadening market share via gaining insights into diverse customers and local environments
- gaining a better return on investment by engaging and retaining top talent for longer
- promoting innovation and risk management by including diverse perspectives
- improving alignment of business practice with values and corporate social responsibility, and
- enhancing brand and reputation.[50]

A recent study on the diversity and inclusion strategies of employers in Australia and Asia revealed business leaders have a high level of awareness about the importance of workforce diversity but are failing to implement a range of strategies to meet critical business needs; they are talking the talk but not walking the walk.[51]

Business Services stakeholders identified the need for innovation and creating an environment that encourages risk and lateral thinking. Having our population diversity represented in the workforce through a mix of age, gender, culture or other facets of diversity can increase the potential for innovation and new business opportunities by tapping into specialised skills and accessing critical insights.[52]

In order to capitalise on the diverse labour force available, businesses may need to provide career and development opportunities for different groups and implement systems to transfer knowledge across different parts of the workforce. Organisational culture is all important in setting the tone for creating an inclusive environment. An inclusive leader is capable of identifying and cultivating multiple perspectives, and creating an environment of collaboration rather than conflict.[53]

Leadership and management skills

Firms need strong management capabilities to support staff to perform at high levels. Skilled leaders and managers can improve retention, reduce workforce churn and help turn their organisations into employers of choice. The Leadership, Employment and Direction (LEAD) Survey recently surveyed 4,000 Australian leaders, managers and employees on workforce issues. About a third of respondents felt their organisation lacked leadership skills and a quarter said management skills were lacking.[54]

Consultations with Business Services enterprises confirmed that leadership and management is a key issue for this industry and that a critical workforce development priority is identifying, training and supporting first-time managers. These people are often technical experts that are given management responsibilities without the required training and support. As part of the LEAD survey, 160 senior people in human resources and learning and development roles were interviewed about

49 BCA, 2013, Action Plan for enduring prosperity.
50 Deloitte, 2011, Only Skin Deep? Re-examining the Business Case for Diversity.
51 Adecco, 2013, The Reality of Talent: Issue Five Diversity.
52 National Sustainability Council, 2013, Sustainable Australia Report 2013.
53 Deloitte, 2011, Only Skin Deep: Re-Examining the Business Case for Diversity.
54 LMA, 2013, Leadership, Employment and Direction Survey.

first-time leaders. Less than half believe that organisations invest adequately in training and skilling people to take on a first-time leadership role. The survey report concluded that, 'the magnitude of under-investment and apparent lack of support in first-time leaders is breathtaking'. It claims that first-time leaders are often being set up for failure, rather than success, and unless this is addressed the impact on productivity may be profound.

Having opportunities for training and development was identified in this same survey as being an increasingly important factor for employees in deciding where they want to work. It is the third top reason employees stay with the organisation they are with. Managers need to be able to identify the pathways and stepping stones that allow individuals to develop, grow and progress with the organisation. Mentoring and coaching opportunities, which are low cost strategies, provide highly effective means of developing people at all levels of an organisation.

Other areas where leaders and managers need to focus their attention identified through the LEAD survey include:

- communicating effectively, including two-way communication, listening skills and feedback, and
- creating connections to enhance relationships and work collaboratively, particularly in light of the challenges faced in multigenerational workforces.

Short, sharp approaches

Many businesses, particularly workers in small business often need short, sharp courses to stay up to date. The Business Services industry is highly dispersed, comprising a few large players in each sector and a large number of small individual practices. The industry is going through a period of consolidation, with larger companies acquiring a number of small and medium organisations. However, small business is expected to remain the backbone of the industry for many years to come. The explosive growth of the freelance economy, fuelled by faster internet speeds and mobile technology, means there are more and more micro businesses throughout the economy, including in legal, advertising, call centre and management consulting industry sectors. One survey found that in 2012, 73 percent of 1,500 global companies were planning to hire more freelancers than they did the previous year.[55]

Consultations indicated that time-poor small business owners are struggling to keep up with the depth and breadth of knowledge they need to have in a fast-moving environment, particularly for understanding changes in technology and developing their general business planning skills. Keeping on top of legislative and regulatory changes is also difficult. For example, small businesses may need support in understanding their obligations under the stronger workplace health and safety legislation introduced in 2012.[56] Furthermore, jobs do not stay the same for long anymore and elements of qualifications quickly become redundant.

Skill sets training can be tailored to meet specific workforce and skill requirements and specialisations[57] and promotes further training by giving clients an opportunity to experience the benefits of upskilling, which may lead them to engage in further training. Recent IBSA research found that employers use skill sets because they are quicker than a full qualification, cheaper than a full qualification and do not include 'irrelevant bits', which are not necessary in their workplace. Qualifications, on the other hand, were considered by many as 'nice to have' rather than a necessity. Skill sets that are endorsed by ISCs and nested in qualifications can provide a pathways role, as well as the focused, leading-edge training required.[58]

55 Elance, 2012, Global Business Survey.
56 For first time, a specific positive duty of care for officers (due diligence) has been introduced. The legislation also includes a broader definition of worker, which encompasses any person who works in any capacity in or as part of the business, including contractors.
57 Mills, et al., 2012, Workforce Skills Development and Engagement in Training Through Skill Sets: Literature Review
58 Ithaca Group, 2013, A Significant Opportunity: The Role and Value of Skill Sets (unpublished report for IBSA).

Current impact of training packages

As part of its continuous improvement process, IBSA is expected to review BSB07 in 2013–14. More details on the changes and potential implications of these improvements follow.

Update on training packages

BSB07 Business Services Training Package

Version 8, released 18 March 2013, saw a restructuring of the Certificate IV and Diploma qualifications in human resources and project management. This restructuring resulted in eight new and revised units of competency in human resources, changes that reflect industry and enterprise skills requirements as well as local and international human resources trends. It also included 22 new units of competency in project management, which reflect:

- changes in occupational structures that require project management capability
- skills recognition and articulation expectations within industry and from its educators
- credentials demand
- need for improved flexibility
- need to restructure units and qualifications to meet industry skills needs, and
- the growing demand for project management skills in a wider range of industries and roles.

Version 9, released on 28 August 2013, responded to a study undertaken by IBSA in 2010: Pathways for the development of language, literacy and numeracy expertise, which recommended the development of a skill set for workplace supervisors along with newly developed language, literacy and numeracy (LLN) units for use in a workplace context.

An important feature of these units is that they are written from the perspective of the workplace and are designed for uptake by mainstream workplace supervisors, not training or literacy specialists.

In addition, four units of competency and associated skill sets have been developed in direct response to demand supported by funding from DIICCSRTE as part of the Clean Energy and Other Skills Package.

The following data are reported from the annual National Centre for Vocation Education and Research (NCVER) VET Provider Collection and the quarterly Apprentice and Trainee Collection; these data report publicly funded training and fee-for-service VET provided by public institutions. They assist in the consideration of trends in the uptake and use of publicly funded VET in IBSA's training packages.

The tables and figures should be read with the understanding that significant amounts of training also occurs outside the publicly funded VET system, including:

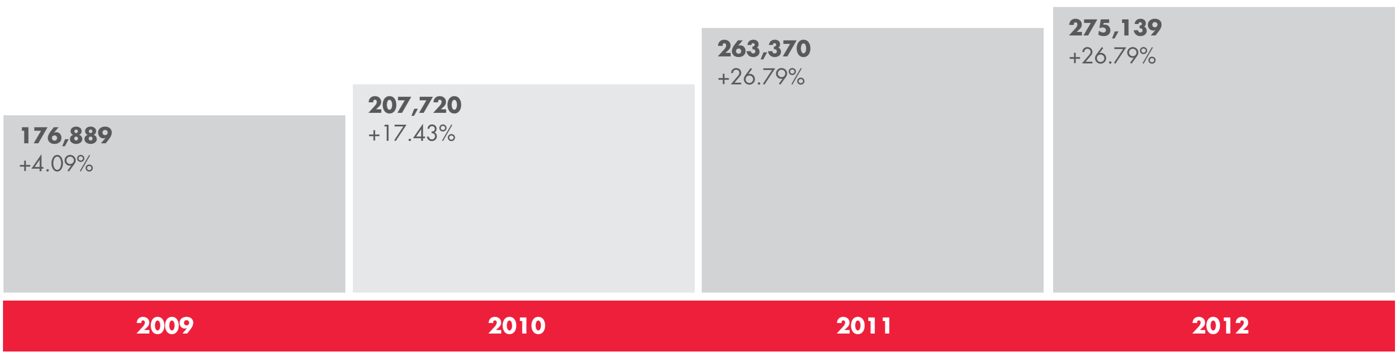
- fee-for-service training in national qualifications provided by private training providers
- in-house training in national qualifications delivered by enterprise RTOs, and
- non-accredited training conducted in house or by external providers.

Attempts to directly correlate these tables of commencement and completion should be avoided because:

- an enrolment is recorded for each year the course is active – multiple enrolments are recorded when a course is undertaken over more than one year, and
- completions are not uniformly reported, ie some jurisdictions only report completions when they award a Certificate, rather than a Statement of Attainment, and this is only done when requested and paid for by the completing student.

These factors may result in an over-reporting of enrolments and underreporting of completions.

Figure 7: Business Services enrolments 2009–12



Qualifications completed in Business Services had an average annual increase of 19.7 percent in the years between 2009 and 2012. In 2012, 90,521 Business Services qualifications were completed.

Note: Completions data for 2012 are preliminary and numbers are expected to increase when final counts become available.

Enrolments

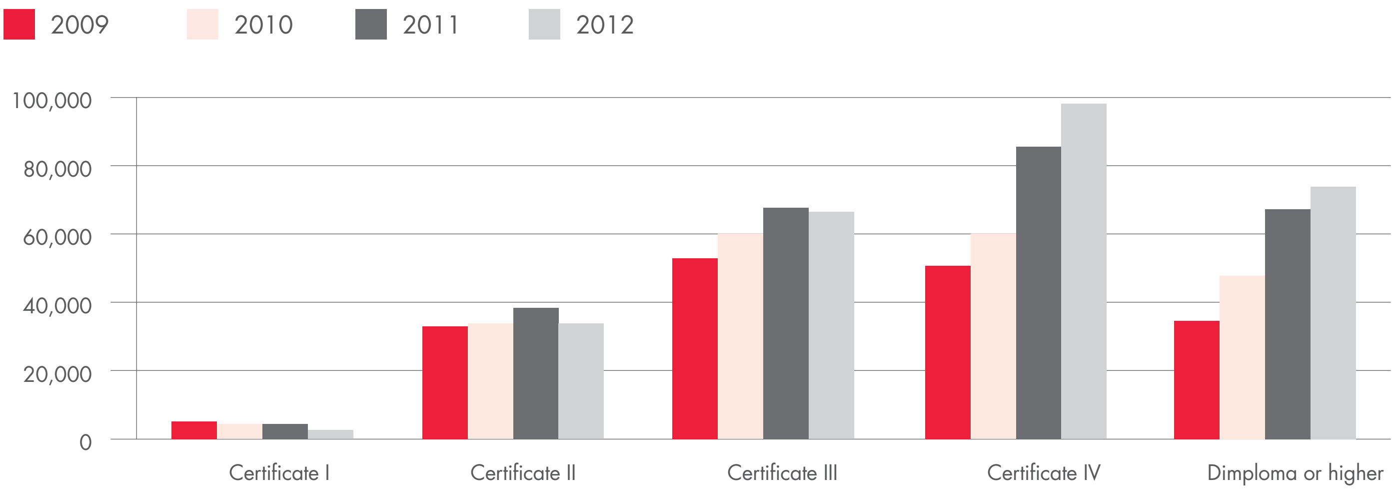
The Business Services Training Package remains the most heavily used of all IBSA training packages for publicly funded VET, accounting for nearly 57 percent of all IBSA training activity in 2012. Enrolments continued to rise in 2012, but growth slowed significantly from 26.8 percent growth in years 2010–11 to 4.5 percent growth in years 2011–12 – see Figure 7 (above).

From 2011, the greatest enrolment growth has occurred in Certificate IV and Diploma or higher qualifications. Until 2010, Certificate III qualifications had the highest enrolments. Enrolments in Business Services Certificate I are very low and decreasing. Enrolments in Certificate II also decreased between 2011 and 2012, while enrolments for all other qualification levels increased – see Figure 8 (overleaf).

Enrolments increased between 2011 and 2012 in all states and territories except Queensland, Western Australia and Tasmania.

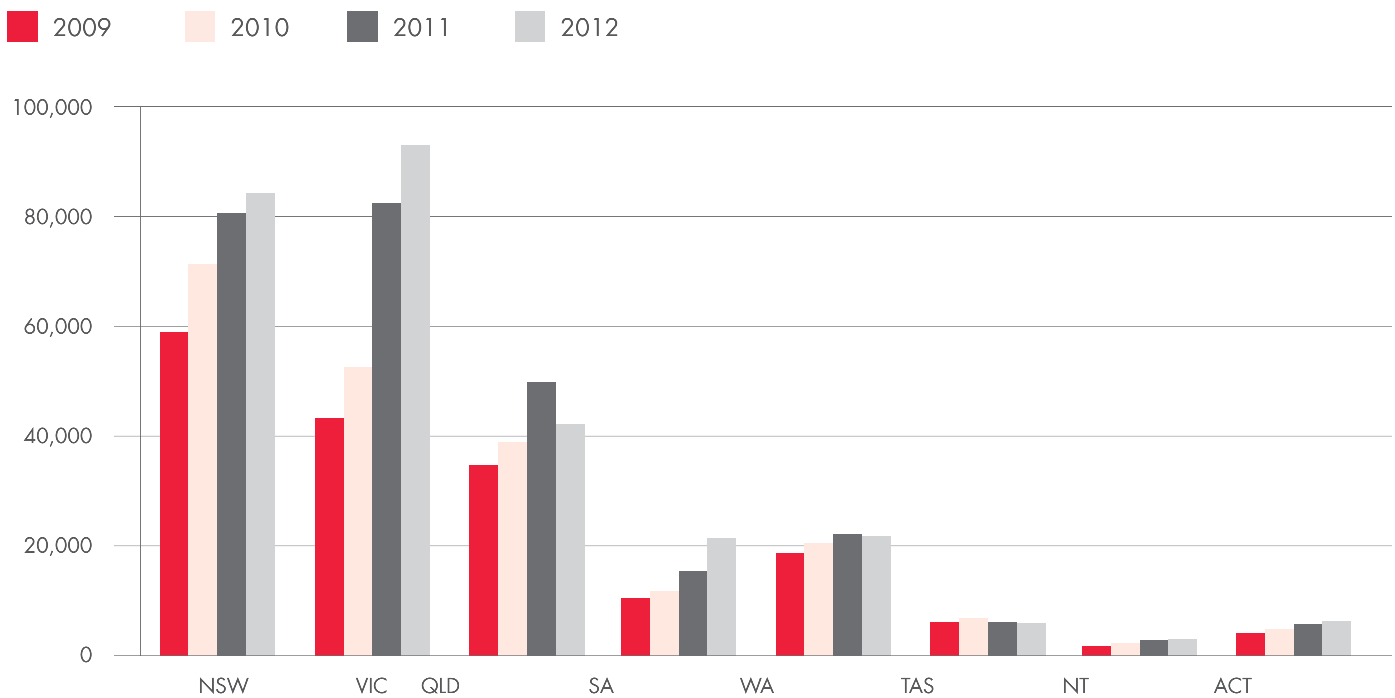
Enrolments in Business Services qualifications increased in 2012 for students from all Australian geographic location types from major cities to remote locations.

Figure 8: Enrolments by qualification level in Business Services, 2009–12



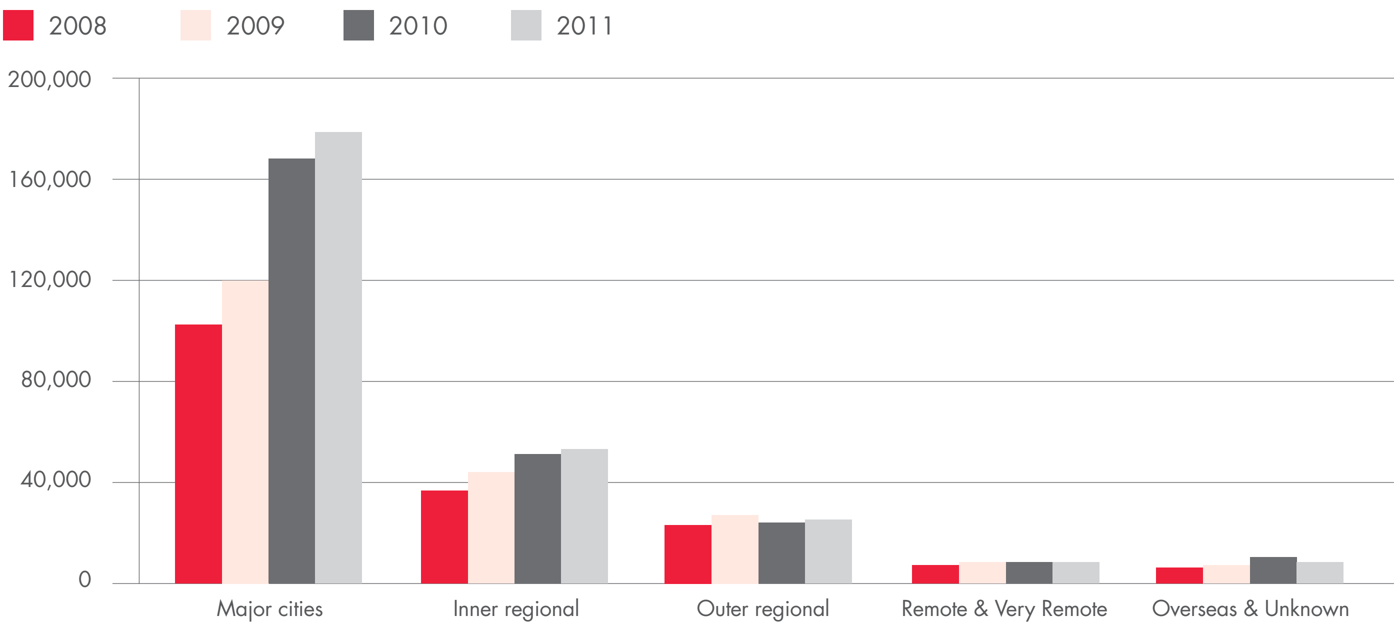
Source: VOCSTATS, http://www.ncver.edu.au/resources/vocstats/intro.html, (extracted 24.07.2013).

Figure 9: Enrolments by state and territory in Business Services qualifications, 2009 - 2012.



Source: VOCSTATS, http://www.ncver.edu.au/resources/vocstats/intro.html, (extracted 24.07.2013).

Figure 10: Enrolments in Business Services qualifications by student remoteness region, 2009–12



Source: VOCSTATS, http://www.ncver.edu.au/resources/vocstats/intro.html, (extracted 24.07.2013 and 26.07.2011).
Note: Data for 2009 and 2010 are based on the Student Remoteness Region 2006 (ARIA+), while data for 2011 and 2012 are based on the Student Remoteness Region 2011 (ARIA+).

Table 4 lists, for 2012, the five Business Services Training Package qualifications with the highest enrolments representing 48.3 percent of total course BSB07 enrolments. The total number of enrolments are in brackets.

Table 5 lists, for 2012, the five Business Services Training Package qualifications with the lowest enrolments; the total number of enrolments are in brackets.

TABLE 4: BSB FIVE QUALIFICATIONS WITH HIGHEST ENROLMENTS	
BSB20107, BSB20101	Certificate II in Business (31,133)
BSB51107	Diploma of Management (30,922)
BSB30407, BSB30201	Certificate III in Business Administration (30,488)
BSB40507, BSB40201	Certificate IV in Business Administration (20,965)
BSB30110, BSB30107, BSB30101	Certificate III in Business (19,483)

TABLE 5: BSB FIVE QUALIFICATIONS WITH LOWEST ENROLMENTS	
BSB50307	Diploma of Customer Contact (11)
BSB41807	Certificate IV in Unionism and Industrial Relations (11)
BSB50710, BSB50707	Diploma of Business (Governance) (14)
BSB40907	Certificate IV in Governance (24)
BSB50507	Diploma of Franchising (40)

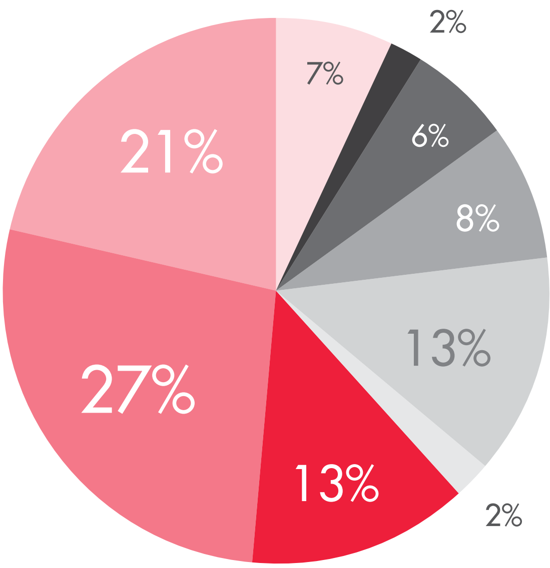
Source: VOCSTATS, http://www.ncver.edu.au/resources/vocstats/intro.html, (extracted 24.07.2013).

Enrolment characteristics

For most people who choose Business Services qualifications it is their first qualification after school. However, 8 percent of participants have a Bachelor or higher degree - see Figure 11.

The age profile of participants is changing, with 40–49 year olds undertaking Business Services qualifications now outnumbering those aged 24 or under. Since 2011, the largest age group undertaking these qualifications has been the

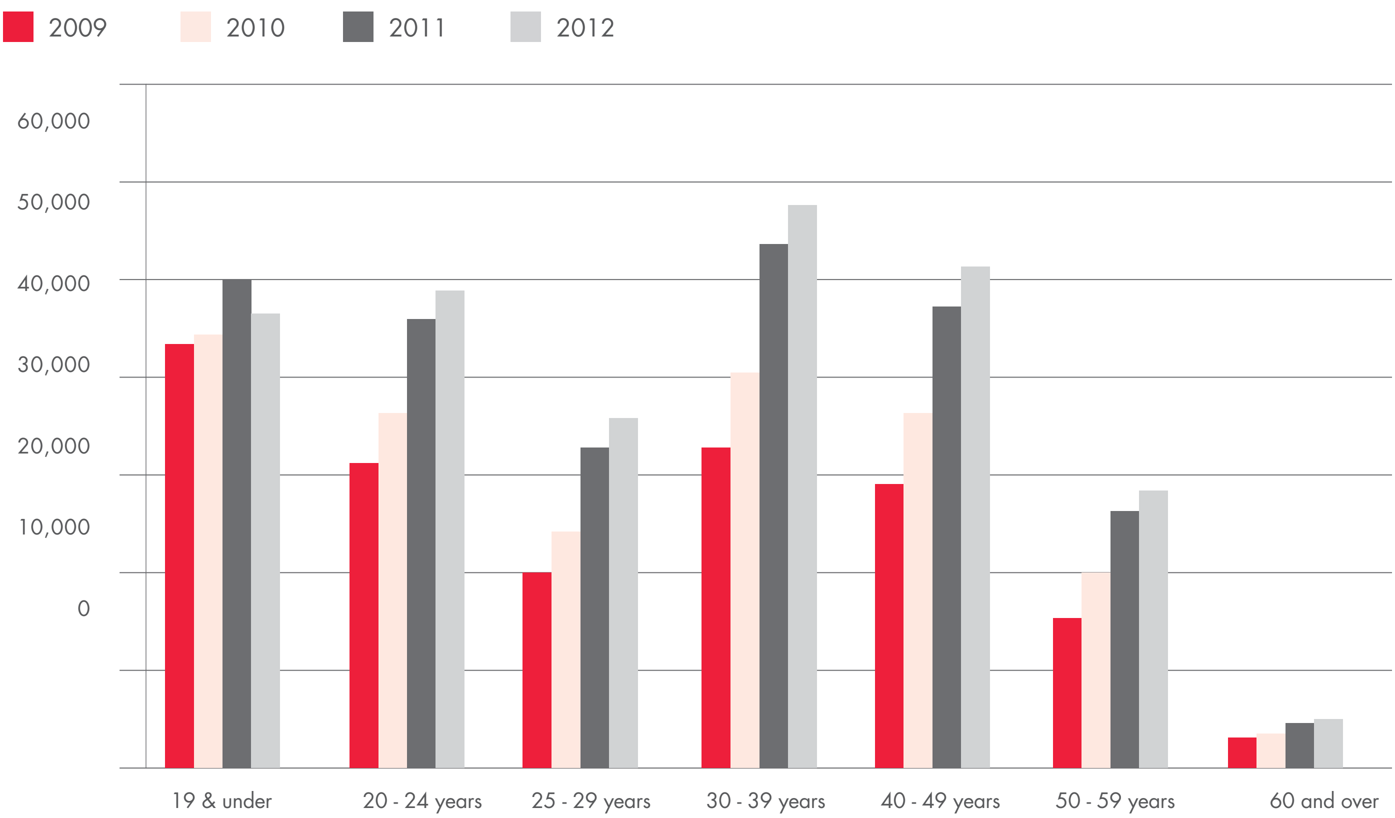
Figure 11: Previous highest education for all participants enrolled in Business Services qualifications, 2009–12



- 7% Bachelor degree/Higher degree level
- 2% Advanced diploma/Associate degree
- 6% Diploma
- 8% Certificate IV
- 13% Certificate III
- 2% Certificate II
- 13% Certificate I
- 27% Year 12
- 21% year 11 or below

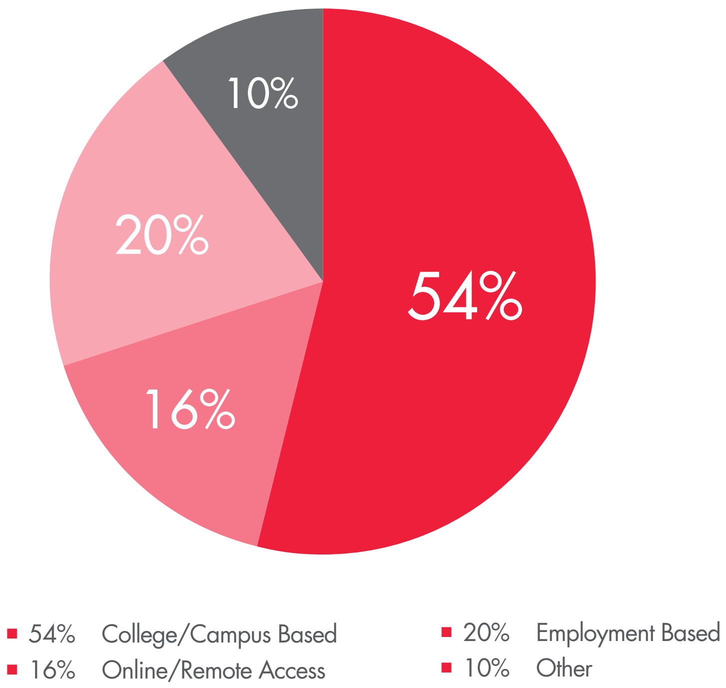
Source: VOCSTATS, http://www.ncver.edu.au/resources/vocstats/intro.html, (extracted 07.08.2013).

Figure 12: Business Services qualifications enrolments by age, 2009–12



Source: VOCSTATS, http://www.ncver.edu.au/resources/vocstats/intro.html, (extracted 26.07.2013).

Figure 13: Enrolments in Business Services by delivery mode, 2012



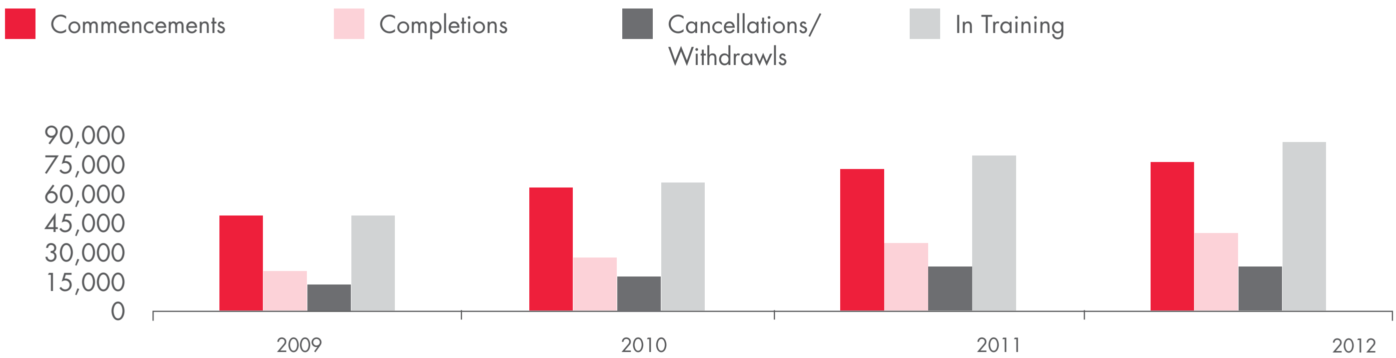
30–39 year age group – see Figure 12. Female participants outnumber male participants by almost 2 to 1. This has remained the trend for several years.

The large majority of participants, 85 per cent, undertake their Business Services qualifications part time, and most are college/campus based. However, there has been a significant growth in the number of people choosing to undertake their course remotely or online. This mode of learning accounted for 16 percent in 2012, up from 12 percent in 2011 – see Figure 13 (above).

Figure 14 (overleaf) shows apprenticeship and traineeship activity in Business Services qualifications between 2009 and 2012. Numbers for 'In Training' relate to the numbers of apprentices and trainees who were in training at the end of each calendar year. Numbers for Commencements, Completions and Cancellations/ Withdrawals are full-year figures. Over 80,000, or almost a third, of Business Services qualifications are undertaken as contracts of training. These proportions have not changed over time.

Additional data on Business Services enrolments and qualifications are available on the IBSA website at https://www.ibsa.org.au/environment-scan-escan

Figure 14: Apprenticeship and traineeship commencements, completions, cancellations/withdrawals and numbers in training in Business Services qualifications, 2009–12



Source: Apprentices and Trainees Collection from VOCSTATS, http://www.ncver.edu.au/resources/vocstats/intro.html, (extracted on 23.07.2013).

Notes specific to apprenticeship and traineeship statistics: Figures are based on date of effect rather than the date of processing. Due to lags in reporting and processing, the most recent figures (generally those for the last 7 quarters, or 2 years) are estimates and are subject to revision.

Outlook for training

The 2012 review of leadership and management qualifications in the BSB07 Training Package addressed issues relating to managing the diversity of staff, making the most of skills to improve productivity, measuring productivity and productivity gains, and implementing strategies for retaining and attracting talent. These issues are expected to continue to be important for training in 2014 and beyond. Issues relating to the new work health and safety legislation have also been picked up by training package revisions.

In the next 18 months to 2 years, training in the Business Services industry is expected to need to focus on the following priority issues to take account of the workforce trends identified in this Escan:

- Ensuring customer service is strongly picked up in all qualifications, not just in relation to making sales, but in terms of enhancing the customer experience throughout the business operations. Project managers require these skills as much as sales and marketing staff.
- Encouraging a diverse range of people to access Business Services qualifications, including men in the 25–54 age group, to ensure businesses have a larger pool of skilled workers to draw upon and can capitalise on different backgrounds and talents to enhance innovation and increase retention. This may require more inclusive training delivery approaches and better connections with the Adult and Community Education sector.
- Understanding the different types of training delivery that work for small and micro businesses, particularly short, sharp approaches such as skill sets that can be tailored to meet specific workforce and skill requirements and specialisations.
- Ensuring relevant training and support is available for first-time managers to help them develop the management and leadership skills they need to complement their technical skills. Investment in training and development of first-time managers may reap rewards for business in improved staff retention and productivity.

- Continuing to develop higher level skills in business services. With the movement of simple, process jobs offshore and improvements in technology allowing business services customers to access 'self help' for more simple advisory services, the industry now requires more people with higher order skills. Demand for higher level skills is already being seen in the dramatic increased take up of Certificate IV Business Services qualifications in 2011 and 2012, now outstripping demand for Certificate III qualifications. With professionals expected to be the fastest growing occupational group in the coming years, opportunities for learners to move through lower level VET in Certificate III and IV programs, and opportunities to articulate into higher AQF level courses, including Degrees and graduate qualifications should be encouraged.[59]
- Integrating ICT skills into business training at all levels. One of the Skill Areas within the Core Skills for Work framework is 'Work in a Digital World'. This Skill Area refers to the capacity to use digital systems and technology to connect to other people and contexts. It involves understanding concepts and language associated with the digital world and the capacity to understand and work with emerging or accepted etiquette and risks associated with online environments. It also involves identifying how digital technology and digitally based systems can extend, enhance or make possible specific aspects of a role or task and create new opportunities. This could be usefully integrated into Business Services qualifications.

59 The acquisition of generic higher level skills can be supported through the Core Skills for Work Developmental Framework released by the Australian Government in 2013. It provides a mechanism for training package developers, curriculum writers and those who develop standards and learning and assessment resources to more clearly articulate the employability skills needed for work. It can also be used by trainers, educators and those who work with job seekers to more explicitly address the development of skills related to three cluster areas – navigating the world of work, interacting with others and getting the work done. The framework outlines a developmental approach, whereby individuals progress from Novice through to Expert, as they attain higher order skills in each of the skill areas

Future directions

This Escan has identified six key areas where skill development should be focused in the next 12–18 months.

The following table summarises the workforce development challenges in this industry:

- Customer service – improving customer service skills so that customer centricity is a practice and a philosophy of everyone in the organisation, not just the sales staff. Further development is expected in two additional areas where an expansion of traditional customer service – both in the business and skills needed – is taking place. Marketing is integrating with customer service, especially through the use of social media. The customer service and marketing skills needed to address business to business activities, not only those needed for business to consumer services.
- Technology – having a workforce with the technical, functional and business skills to use ICT strategically to support business activities, reduce service delivery costs and improve productivity and profitability, particularly picking up on opportunities emerging through social media, mobile technologies, cloud computing and data analytics.
- Diversity – capitalising on the innovation that emerges when businesses have a diverse workforce, including people from different generations and different socioeconomic and cultural backgrounds. Leaders and managers need the skills to provide career and development opportunities for different groups, to implement systems to transfer knowledge across different parts of the organisation, to identify and cultivate multiple perspectives, and create an environment of collaboration. They also need to embrace two-way communication, including skills in listening and providing feedback.
- First-time managers – investing adequately in training and upskilling first-time leaders, particularly through the Certificate IV level leadership and management qualification. This may reduce staff churn and improve productivity.
- Skill sets – supporting all businesses, but particularly time-poor small businesses, including sole operators/freelancers, to keep up with the depth and breadth of knowledge they need to have in a fast moving business environment, particularly in understanding changes in technology and developing their general business planning skills as well as keeping on top of legislative and regulatory change. Further use of skill sets to assist small business to undertake upskilling and to support progressive credentialing to a full qualification.
- Small business skills - considering the broader skills needed by a person starting and operating a small business and their presence in the Certificate IV in Small Business by contrasting with the original focus of skills requirements for learners involved in the New Enterprise Incentive Scheme (NEIS).
- High level skills - with the movement of simple, process jobs offshore and improvements in technology allowing business services customers to access ‘self-help’ for more simple advisory services, the industry now requires more people with higher order skills.
- Encouraging articulation pathways – working with the Core Skills Framework to support staff become ‘Expert Performers’ in a range of skill areas and promoting pathways to higher level VET programs are all important.
- Along with the diversity and small business points above, core skills consistent in the Core Skills for Work Framework are considered critical in business services particularly Work In A Digital World, Manage Career and Work Life, Connect and Work with Others and Recognise and Utilise Diverse Perspectives.

Priorities for IBSA training packages

- Consider further areas where skill sets for small and micro businesses, upskilling may need developing including legislative and regulatory responsibilities, business planning and strategic and functional technical skills.
- Consider the inclusion of customer service units focusing on business to business and social media into Business Services qualifications.
- In the review of Business Services leadership and management qualifications, ensure continued focus on capitalising on a diverse, multigenerational workforce, building strong mentoring and coaching skills, listening and feedback skills, cultural competence and skills in managing a contingent workforce.

Supporting a responsive national VET system

- Provide diverse training service options for small and micro businesses, including skill sets, learning partnerships and work-integrated learning.
- Encourage the VET and higher education sectors to cooperate in developing articulation arrangements that reflect the need for higher level business skills as simple jobs are subsumed by technology and/or moved offshore.
- Encourage businesses to offer training and development opportunities to their staff, particularly first-time managers.

Table 6: Workforce development challenges

WORKFORCE DEVELOPMENT CHALLENGE:	IMPACT ON:	CRITICAL FUTURE SKILLS:
Integrating ICT skills into business training at all levels	All businesses	▪ social media ▪ big data ▪ cloud computing and systems security ▪ strategic skills to integrate ICT into business processes ▪ Core Skills for Work – 'Work in a Digital World'
Continuing to develop higher level skills in business services	RTOs Students	▪ articulation pathways from VET to higher education ▪ VET pathways from lower to higher level
Ensuring relevant training and support is available for first-time managers	Frontline workers All businesses, particularly medium to large	▪ frontline management ▪ Core Skills for Work ▪ mentoring and coaching
Content and delivery styles that work for small and micro businesses	Small businesses Micro Businesses	▪ skill sets on legislative and regulatory requirements, business planning and functional and strategic technology skills ▪ coaching and mentoring ▪ business partnerships
Encouraging a diverse range of people to access business services qualifications, skill sets and units of competency	All businesses	▪ Core Skills for Work – 'Recognise and Utilise Diverse Perspectives' ▪ leadership and management skills ▪ cultural competence
Ensuring customer service is strongly picked up in all qualifications, skill sets and units of competency	All businesses	▪ communication, particularly listening ▪ relationship management ▪ customer service

Appendix A
Methodology and bibliography

Methodology and stakeholder input

Statistical information for this report was gathered through a desktop research process from a range of sources as indicated in the bibliography.

Further input into this Escan was gathered from industry stakeholders via a series of consultation forums held in 2013. Forums were held in Melbourne, Hobart, Brisbane, Sydney, Perth and Adelaide.

Survey tools were used at each of the forums to gather information from participants, including advice on occupations in demand.

This Escan was validated by IBSA's Industry Advisory Committee and State and Territory Advisory Network representatives in October 2013.

The following organisations have made valuable contributions to this Escan:

Ability Associates Australia

Aboard Training Australia and Frank Lee Services

Access Training Centre

ACS Foundation WA

Addendum Learning Services

Adelaide Business Hub

Adelaide College of the Arts TAFE

Advance Business Specialists (ABS)

Aegis Aspire

Aegis Services Australia Pty Ltd

Australian and New Zealand Institute of Insurance and Finance (ANZIIF)

Arts Centre Melbourne

Arts Communications Finance Industries and Property Services (ACFIPS)

Arts Industry Council of South Australia

Ashley Institute of Training

Association of Independent Schools

Atsolutions

Australian Army

Australian Broadcasting Corporation (ABC)

Australian Business School

Australian Child Care Career Options

Australian College of Commerce & Management

Australian College of Training

Australian Computer Society

Australian English Language Centre (AELC)

Australian Financial Management Association (AFMA)

Australian Industry Trade College

Australian Institute of Financial Services and Accounting (AIFA)

Australian Institute of Management QLD NSW ACT and NT (AIM QNAN)

Australian Institute of Management Western Australia (AIM WA)

Australian Institute of Personal Trainers

Australian Marketing Institute

Australian Medical Association (WA)

Australian Nursing and Midwifery Education Centre

Australian Skills Quality Authority

Australian Tax Office

Australis Institute

Australian Professional Skills Institute

Australian Vocational Education & Training Academy (AVETA)

Avant-Garde Leadership/Institute for Sustainability & Social Innovation

BankVic

Belprince

Betterlink Group

Blossom Training

Box Hill Institute

BPG Training

Brisbane North Institute of TAFE (BNIT)

Bunyip Consulting
Business Foundations
Byron College
Canberra Institute of Technology
Career Employment Australia
Careers Australia
Cato HR
Central College Online
Central Institute of Technology
Centre for Adult Education (CAE) Australia
Centre for Innovative Industries Economic Research (CIIER)/Australian Computer Society - Victoria
Challenger Institute of Technology
Chamber of Commerce and Industry WA
Chisholm Institute
City of Unley
Communications and Information Technology Training (CITT)
Community College Gippsland
Community Services, Health & Education Training Council
Construction, Forestry, Mining and Energy Union (CFMEU)
CPA Australia
Creative Corporate Solutions
Creative Industries Skills Council
Crown Institute of Business and Technology
C. Y. O'Connor Institute
Dean McDonald Consulting
Department of Commerce
Department of Defence - Army
Development Dynamics
Department of Further Education, Employment, Science and Technology (DFEEST)
Ducere
Elan Projects
ENHANCE Training & Recruitment
Esset Australia
Evocca College
Evolve Training Solutions
Excel Training
Financial, Administrative and Professional Services Training Council (FAPSTC)
Financial Education Professionals Pty Ltd
Financial, Administrative & Professional Services Training Council
FINSART inc.
Foundation Education
Fuji Xerox Australia Pty Ltd
FutureNow
GippsTAFE
Goodstart Institute of Early learning
Greenline AG Pty Ltd
Group Training Australia (SA) Inc.
Hamilton Secondary College
Heritage Bank Ltd
Humanagers
Industry Skills Unit, Sydney Institute, TAFE NSW
Infinite Education & Training
Insources Education
Institute of Certified Bookkeepers
Intellitrain
Interlink Technology Services P/L
Intellectual Property (IP) AUSTRALIA
Jenard Training and Personnel
Leadership Learning Dynmaics
Learning Verve
Lennox Institute
Line Management Institute of Training
Live Performance Australia
Leadership Management Australia (LMA) - Farley Group
Locher and Associates
Major Training Group
Management Consultancy International
Mansfield Adult Continuing Education
Macquarie Education Group Australia (MEGA)
Master Electricians SkillsConnect
Meagan Newton Training and Consultant
Media, Entertainment & Arts Alliance
MEGT
Mental Health Coalition of SA
Merinda Park Learning and Community Centre
Metro Screen
Metropolitan South Institute of TAFE
MiDel Education Pty Ltd
Miss Music Biz
Mosaic Audio Visual Pty Ltd
MSIT Creative Industries Graphic Design
National Insurance Brokers Association
National training organisation
Navitas Professional
NBN Co.
New Horizons Learning Centre(Perth)
Newskills Limited
Northern Melbourne Institute of TAFE (NMIT)
Norgrove Training
NSW Police
OAK Tasmania
Open Channel Co-operative
Open Colleges
Paradigm Infinitum
Participate Film Academy
Performis Pty Ltd
Personal Injury Education Foundation
Perth Institute of Contemporary Arts (PICA)
Pilbara Institute
Pivot Solutions Pty Ltd trading as The Pivot Institute
Polytechnic West - Australian Centre for Work Safety
Printing Industries Association of Australia
Professional Training & Assessment
Provet Pty Ltd
Queen Anne English College
Queenlsand Catholic Education Commission
Queensland Tourism Industry Council
Radio Adelaide
Ramsden Telecommunications Training
Raytheon Australia
REACH for Training
Response Learning
Rhodes College
SA Ambulance Service
SA Power Networks
Scott Adam Management
Serco Global Services
Service Skills South Australia
Shoreline LEarning and Development
SKILLED Group
SkillsHQ
Society of Motion Picture and Television Engineers
Software Publications Pty Ltd
Sol-utions Business Services

Southbank Institute of Technology
Southern cross education institue
Spectra Training
Spectrum Training
Star Training and Assessing
Sterling Business College
Suncorp
Superannuation Compliance Services
Sustainable Advantage Group Australia Pty Ltd
Sydney College of Business and IT
Sydney Community College
Sydney Film School
Sydney Instituite of TAFE
Sydney Institute of Technology
TAFE Hunter Insitute
TAFE NSW
TAFE NSW Open Training and Education Network (OTEN)
TAFE NSW South Western Sydney Institute (SWSI)
TAFE SA
TAFE SA Training Package Unit
Task Force Community Agency Inc.
Tasmanian Polytechnic/TasTAFE
Tasmanian Small Business Council
Technology Industry Association
Telstra
The Association of Superannuation Funds of Australia Limited
The Australian YMCA Institute of Education and Training (Perth Campus)
The Graphic Arts Merchants Association of Australia (GAMAA)
The Recovre Training Services Pty Ltd
THINK Education
Telecommunications Industry Training Advisory Board (TITAB) Australia
Training and Tertiary Education
Training Th@t Works
Trainwest
True North Education & Training
Tactical Training Group (TTG)
Universal Events Management
Upskilled
Victoria University
Victorian Aboriginal Education Association Incorporated
Victorian Institute of Culinary Arts and Technology
Victorian Working Party
Vostro Institute
Western Australian Academy of Performing Arts (WAAPA)
WA Department of Training & Workforce Development (WADTWD)
Walking Horse Music
West Coast Institute of Training (WCIT)
Western Australian Museum
Work & Training
Workfit Australia Pty Ltd
WorkSafe Victoria

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Appendix B – Business Services Occupations in demand

IBSA reports critical occupations in demand to Government and industry stakeholders.

This alphabetical list reflects demand in the Business Services industry for occupations and job roles reported at IBSA's Escan industry consultations and validations conducted in 2013.

Underpinning industry intelligence and research were also incorporated into this list.

Qualifications that correspond to the occupations in demand are also provided. The 'bold' occupations and job roles represent newly reported occupations in demand.

Table 7: Business services occupations in demand

ANZSCO	OCCUPATION/JOB ROLE	TRAINING PACKAGE QUALIFICATION	
149211	Contact centre manager	BSB40312	Cert IV in Customer Contact
		BSB50311	Diploma of Customer Contact
		BSB50407	Diploma of Business Management
541112	**Contact centre workers**	**BSB30211**	**Cert III in Customer Contact**
		BSB40312	**Cert IV in Customer Contact**
		BSBSS00002	**Basic Contact Centre Operations Skill Set**
		PSPSS00024	**Operate in a Customer Contact Environment Skill Set**
511111 511112	Contract, program, project manager	BSB41513	Certificate IV in Project Management Practice
		BSB51413	Diploma of Project Management
		BSB60707	Advanced Diploma of Project Management
132111	Corporate services manager	BSB50207	Diploma of Business
		BSB51107	Diploma of Management
		BSB60407	Advanced Diploma of Management
132111	**Corporate social responsibility manager**	**BSB50207**	**Diploma of Business**
		BSB51107	**Diploma of Management**
		BSB60407	**Advanced Diploma of Management**
521212	**Court clerk/ legal support**	**BSB40110**	**Cert IV in Legal Services**

Table 7: Business services occupations in demand (cont.)

ANZSCO	OCCUPATION/JOB ROLE	TRAINING PACKAGE QUALIFICATION	
541211 149212	Customer service/ frontline inquiry officer	BSB30412 BSB40507 BSB50407	Cert III in Business Administration Cert IV in Business Administration Diploma in Business Administration
133512 512111	Frontline supervisor	BSB40812 BSB50311	Cert IV in Frontline Management Diploma of Customer Contact
531111	General administrative officer	BSB30412 BSB40507 BSB50407	Cert III in Business Administration Cert IV in Business Administration Diploma of Business Administration
111211	General manager	BSB50207 BSB51107 BSB60407	Diploma of Business Diploma of Management Advanced Diploma of Management
599411 132311	Human resource administrator/manager	BSB41013 BSB50613 BSB60907	Cert IV in Human Resources Diploma of Human Resources Management Advanced Diploma of Management (Human Resources)
224711 **224712**	**Management and organisation analysts**	**BSB51107** **BSB60407**	**Diploma of Management** **Advanced Diploma of Management**
224214 224999	Manager – data and records	BSB40212 BSB41707 BSB50207 BSB51707 BSB60207 BSB60807	Cert IV in Business Cert IV in Recordkeeping Diploma of Business Diploma of Recordkeeping Advanced Diploma of Business Advanced Diploma of Recordkeeping
111211	**Manager business development/strategy**	**BSB50207** **BSB51107**	**Diploma of Business** **Diploma of Management**
131112 **225113**	**Manager/advisor - social media**	**BSB41307** **BSB51207** **BSB60507**	**Certificate IV in Marketing** **Diploma of Marketing** **Advanced Diploma of Marketing**

Table 7: Business services occupations in demand (cont.)

ANZSCO	OCCUPATION/JOB ROLE	TRAINING PACKAGE QUALIFICATION	
131112 **131113** **131114**	**Managers, advertising, sales and public relations**	**BSB40107** **BSB40610** **BSB41307** **BSB50107** **BSB51207**	**Cert IV in Advertising** **Cert IV in Business Sales** **Cert IV in Marketing** **Diploma of Advertising** **Diploma of Marketing**
132111	Managers, corporate services	BSB50407 BSB60207	Diploma of Business Administration Advanced Diploma of Business
225112	**Market research analyst**	**BSB41307** **BSB51207** **BSB60507**	**Cert IV in Marketing** **Diploma of Marketing** **Advanced Diploma of Marketing**
512111 512211 512299	Office and practice manager	BSB50207 BSB50407 BSB60407 BSB60207	Diploma of Business Diploma of Business Administration Advanced Diploma of Management Advanced Diploma of Business
132311	OHS/WHS manager	BSB51312 BSB60612	Diploma of Work Health and Safety Advanced Diploma of Work Health and Safety
251312	OHS/WHS officer	BSB30712 BSB41412	Certificate III in Work Health and Safety Certificate IV in Work Health and Safety
224712	Organisation and workforce development specialist	BSB50407 BSB51107 BSB60207 BSB60407	Diploma of Business Administration Diploma of Management Advanced Diploma of Business Advanced Diploma of Management
221213 221214	Quality and compliance auditor	BSB50407 BSB51107 BSB51607 BSB60407	Diploma of Business Administration Diploma of Management Diploma of Quality Auditing Advanced Diploma of Management
234312 234399 251311	Sustainability manager	BSB51107 BSB60407	Diploma of Management, including units on business continuity and sustainability Advanced Diploma of Management, including units on business continuity and sustainability

Appendix C – NCVER data

The following data are reported from the National Centre for Vocational Education and Research (NCVER) VOCSTATS data warehouse, which includes data from the national annual VET Provider Collection and the quarterly national Apprentice and Trainee Collection.

About NCVER data

These collections bring together data on publicly funded training and fee-for-service VET provided by public institutions.

The tables and figures should be read understanding that significant amounts of training in national qualifications also occurs outside the publicly funded VET system, including:

- fee-for-service training in national qualifications provided by private training providers
- in-house training in national qualifications delivered by enterprise RTOs, and
- other nationally recognised or non-accredited training conducted in house or by external providers.

Consistent with NCVER reporting, the tables and figures also exclude delivery undertaken at overseas campuses of Australian VET institutions, credit transfer and VET delivered in schools, where the delivery has been undertaken by schools.

Completions data in this report includes all reported completions, regardless of whether the qualification was reported to NCVER as Issued or Not Issued. While the vast majority of reported qualification completions are reported as Issued, significant numbers of students complete a qualification but do not request that their qualification certificate be issued. Students may have to pay a fee to have the certificate issued. It is likely that reporting of qualifications issued is more comprehensive than that for qualifications that are not issued.

While the previous 2012 IBSA NCVER report referred to qualifications issued, the data presented in that report related to all reported qualification completions, as does this year's report. Hence, the data in this report is comparable with that included in previous reports but the description has been updated to refer to qualifications completed.

Completions data for 2012 is preliminary and may be revised upwards in the 2013 VET Provider Collection, which accommodates further notification of qualifications completed in 2012.

Attempts to directly correlate or compare tables of commencements or enrolments and completions should be avoided due of the following:

- An enrolment in a qualification is recorded for each year the student's enrolment is active – the same qualification enrolment is counted in every year the student is undertaking the course. This over counts enrolments when compared to completions as a completion can occur at most only once for a student's enrolment in a qualification, regardless of how long the student takes to complete the qualification.
- There are different expected time spans between enrolment and completion for different qualifications and there are differences in the time an individual student may take to complete a particular qualification. Many qualifications take more than one year to complete. There is no clear link between an enrolment figure for one time period and a completion figure for another period.
- Completions are not uniformly reported. Some training organisations and jurisdictions mainly report completions when a certificate (rather than a Statement of Attainment) is awarded. Completions may thus be under reported or there may be delays in reporting to reflect delays in issuing certificates.

Note: consistent with previous versions of this NCVER Data Report, IBSA qualifications for which enrolments have never been reported to the national VET Provider Collection by any training provider are not included in this Appendix.

Qualifications with zero enrolments

The qualifications listed below were current at the end of 2012, were reported to the national collection as either publicly funded or fee-for-service activity at some point in time by at least one training organisation or jurisdiction, but did not have any enrolments in publicly funded training and fee-for-service VET provided by public institutions for 2012. It's important to note that significant amounts of training occur outside the publicly funded VET system.

Business Services (BSB)

For 2012, the following current Business Services qualifications had no publicly funded enrolments:

- BSB30507 Certificate III in Business Administration (International Education)
- BSB40707 Certificate IV in Franchising
- BSB60807 Advanced Diploma of Recordkeeping

Business Services - Enrolments

BSB - BUSINESS SERVICES (INCLUDES BSA) - ENROLMENTS	2008	2009	2010	2011
ADMINISTRATION				
BSB30407, BSB30201 – Certificate III in Business Administration	26,580	27,271	29,994	30,488
BSB40507, BSB40201 – Certificate IV in Business Administration	7,073	9,163	19,614	20,965
BSB50407, BSB50201 – Diploma of Business Administration	2,601	3,331	4,455	5,780
ADVERTISING				
BSB40107, BSB40601 – Certificate IV in Advertising	699	526	422	392
BSB50107, BSB50601 – Diploma of Advertising	482	436	318	289
BSB60110, BSB60107, BSB60501 – Advanced Diploma of Advertising	156	178	118	114
AUDITING				
BSB51607, BSB51904 – Diploma of Quality Auditing	101	248	345	569
BUSINESS				
BSB10107, BSB10101 – Certificate I in Business	4,760	4,138	3,953	2,970
BSB20107, BSB20101 – Certificate II in Business	32,297	33,105	35,922	31,133
BSB30110, BSB30107, BSB30101 – Certificate III in Business	13,294	16,579	18,857	19,483
BSB40207, BSB40101 – Certificate IV in Business	5,694	7,317	10,915	14,131
BSB50207, BSB50101 – Diploma of Business	3,365	4,161	6,205	7,835
BSB60207 – Advanced Diploma of Business	34	219	206	389
BUSINESS DEVELOPMENT/SALES				
BSB50501 – Diploma of Business Development	45	0	0	0
BSB40501 – Certificate IV in Business Development	49	9	2	0
BSB40610, BSB40607 – Certificate IV in Business Sales	637	1,039	1,719	2,523
BUSINESS MANAGEMENT (SEE ALSO FRONTLINE MANAGEMENT)				
BSB41101 – Certificate IV in Business Management	544	64	12	0
BSB50401 – Diploma of Business Management	1,344	304	79	19
BSB60201 – Advanced Diploma of Business Management	423	22	0	0

Business Services - Enrolments (cont.)

BSB - BUSINESS SERVICES (INCLUDES BSA) - ENROLMENTS	2008	2009	2010	2011
CUSTOMER CONTACT				
BSB20211, BSB20207 – Certificate II in Customer Contact	1,095	1,154	2,428	2,409
BSB30211, BSB30207 – Certificate III in Customer Contact	5,092	8,414	9,638	7,868
BSB30907 — Certificate III in Business Administration (Education)	335	345	304	476
BSB40311, BSB40307 – Certificate IV in Customer Contact	440	1,498	4,286	6,700
BSB50307 – Diploma of Customer Contact	46	74	33	11
BSB60307 – Advanced Diploma of Customer Contact	12	12	0	0
E-BUSINESS				
BSB30601 – Certificate III in e-Business	23	41	0	0
BSB41201 – Certificate IV in e-Business	3	0	0	0
BSB51101 – Diploma of e-Business	8	0	0	0
BSB51301 – Diploma of e-Learning	33	0	0	0
EMPLOYMENT SERVICES				
BSB41904 – Certificate IV in Business (Employment Services)	90	0	0	0
FRANCHISING				
BSB40707 – Certificate IV in Franchising	133	0	3	0
BSB50507 – Diploma of Franchising	0	11	67	40
FRONTLINE MANAGEMENT				
BSB31207, BSB30504 – Certificate III in Frontline Management	772	1,260	1,608	430
BSB40807, BSB41004, BSB41001 – Certificate IV in Frontline Management	11,118	12,822	16,608	18,498
BSB51004 – Diploma of Business (Frontline Management)	947	200	117	37
BSB51107 – Diploma of Management	9,127	19,013	31,086	30,922
BSB60407 – Advanced Diploma of Management	1,282	2,410	3,266	3,581
GOVERNANCE				
BSB40907, BSB40901 – Certificate IV in Governance	332	79	21	24
BSB41910, BSB41907 – Certificate IV in Business (Governance)	88	215	138	155
BSB50710, BSB50707, BSB50901 – Diploma of Business (Governance)	53	16	15	14
HUMAN RESOURCES				
BSB41007, BSB40801 – Certificate IV in Human Resources	4,090	4,261	4,678	5,024

Business Services - Enrolments (cont.)

BSB - BUSINESS SERVICES (INCLUDES BSA) - ENROLMENTS	2008	2009	2010	2011
BSB50607, BSB50801 – Diploma of Human Resources Management	4,142	4,319	4,824	5,824
BSB60907, BSB60301 – Advanced Diploma of Management (Human Resources)	273	404	412	523
INTERNATIONAL TRADE				
BSB30507 – Certificate III in Business Administration (International Education)	7	0	0	0
BSB30607, BSB30804 – Certificate III in International Trade	147	131	103	65
BSB41107, BSB42004 – Certificate IV in International Trade	656	687	933	850
BSB50807, BSB52004 – Diploma of International Business	1,626	1,514	1,138	1,008
LEGAL				
BSB31007, BSA30200 – Certificate III in Business Administration (Legal)	1,445	1,289	1,271	1,277
BSB40110, BSB41207, BSA40200 – Certificate IV in Legal Services	456	466	528	813
BSB50110, BSB51007, BSA50200 – Diploma of Legal Services	243	178	199	256
MARKETING				
BSB41307, BSB40701 – Certificate IV in Marketing	2,819	2,580	2,306	2,223
BSB51207, BSB50701 – Diploma of Marketing	2,217	2,026	2,040	2,055
BSB60507, BSB60601 – Advanced Diploma of Marketing	674	598	585	521
MEDICAL				
BSB31107, BSB30704 – Certificate III in Business Administration (Medical)	3,267	3,593	3,856	4,460
MICRO BUSINESS				
BSB30307 – Certificate III in Micro Business Operations	932	872	806	902
OH&S				
BSB30707, BSB31606 – Certificate III in Occupational Health and Safety	905	909	1,080	1,209
BSB41407, BSB41604 – Certificate IV in Occupational Health and Safety	5,487	7,485	9,850	12,229
BSB51307, BSB51604 – Diploma of Occupational Health and Safety	1,654	2,847	4,366	5,779
BSB60607, BSB61004 – Advanced Diploma of Occupational Health and Safety	179	256	244	309

Business Services - Enrolments (cont.)

BSB - BUSINESS SERVICES (INCLUDES BSA) - ENROLMENTS	2009	2010	2011	2012
ORGANISATIONAL LEARNING				
BSB70107 – Vocational Graduate Certificate in Organisational Learning and Capability Development	0	1	0	0
BSB80107 – Vocational Graduate Diploma of Organisational Learning and Capability Development	0	1	0	0
PROJECT MANAGMENT				
BSB41507, BSB41504 – Certificate IV in Project Management	2,226	3,237	4,151	4,874
BSB51407, BSB51504 – Diploma of Project Management	3,253	4,614	6,669	7,025
BSB60707, BSB60904 – Advanced Diploma of Project Management	60	145	356	460
PURCHASING				
BSB41607, BSB41404 – Certificate IV in Purchasing	142	182	97	129
BSB51507 – Diploma of Purchasing	79	117	162	203
RECORDKEEPING				
BSB30807, BSB30401 – Certificate III in Recordkeeping	165	146	140	79
BSB41707, BSB40301 – Certificate IV in Recordkeeping	66	73	69	76
BSB51707, BSB50301 – Diploma of Recordkeeping	43	27	30	41
BSB60807 – Advanced Diploma of Recordkeeping	0	0	4	0
SMALL BUSINESS MANAGMENT				
BSB40407, BSB40401 – Certificate IV in Small Business Management	8,313	9,048	9,673	8,667
UNIONISM				
BSB41807, BSB41804 – Certificate IV in Unionism and Industrial Relations	8	3	3	11
MISCELLANEOUS				
BSA10197 – Certificate I in Business (Office Skills)	0	0	1	0
BSA20100 – Certificate II in Business (Office Administration)	3	0	0	0
BSA20197 – Certificate II in Business (Office Administration)	1	0	0	0
BSA30197 – Certificate III in Business (Office Administration)	1	0	0	0
BSB30301 – Certificate III in Business (Sales)	72	0	0	0

Business Services – Qualification Completions

BSB – BUSINESS SERVICES (INCLUDES BSA) – QUALIFICATION COMPLETIONS	2009	2010	2011	PRELIMINARY 2012
ADMINISTRATION				
BSB30407, BSB30201 – Certificate III in Business Administration	7,933	8,151	10,246	10,522
BSB40507, BSB40201, BSA40197 – Certificate IV in Business	1,876	2,364	3,455	9,290
BSB50407, BSB50201, BSA50100, BSA50197 – Diploma of Business	1,138	1,123	1,549	1,875
ADVERTISING				
BSB40107, BSB40601 – Certificate IV in Advertising	278	166	125	147
BSB50107, BSB50601 – Diploma of Advertising	150	173	156	143
BSB60110, BSB60107, BSB60501 - Advanced Diploma of Advertising	63	104	83	57
AUDITING				
BSB51607, BSB51904 – Diploma of Quality Auditing	53	67	211	240
BUSINESS				
BSB10107, BSB10101 – Certificate I in Business	1,548	867	990	766
BSB20107, BSB20101 – Certificate II in Business	7,129	8,673	8,430	7,501
BSB30110, BSB30107, BSB30101 – Certificate III in Business	4,115	5,185	6,431	7,020
BSB40207, BSB40101 – Certificate IV in Business	1,531	2,495	2,827	3,552
BSB50207, BSB50101 – Diploma of Business	1,283	1,476	1,747	2,289
BSB60207 – Advanced Diploma of Business	8	48	30	122
BUSINESS DEVELOPMENT/ SALES				
BSB40501 – Certificate IV in Business Development	24	5	1	0
BSB40610, BSB40607 – Certificate IV in Business Sales	170	309	647	619
BSB50501 – Diploma of Business Development	26	0	0	0
BUSINESS MANAGEMENT (SEE ALSO FRONTLINE MANAGEMENT)				
BSB41101 – Certificate IV in Business Management	249	41	7	5
BSB50401 – Diploma of Business Management	490	104	18	8
BSB60201 – Advanced Diploma of Business Management	525	139	1	2
CUSTOMER CONTACT				
BSB20211, BSB20207 – Certificate II in Customer Contact	272	885	957	1,044
BSB30211, BSB30207 – Certificate III in Customer Contact	1,147	2,761	3,602	3,332

Business Services – Qualification Completions

BSB – BUSINESS SERVICES (INCLUDES BSA) – QUALIFICATION COMPLETIONS	2009	2010	2011	PRELIMINARY 2012
BSB30907 – Certificate III in Business Administration (Education)	95	137	116	232
BSB40311, BSB40307 – Certificate IV in Customer Contact	81	287	984	1,709
BSB50307 – Diploma of Customer Contact	4	28	6	8
BSB60307 – Advanced Diploma of Customer Contact	0	9	0	0
E-BUSINESS				
BSB30601 – Certificate III in e-Business	12	2	0	0
BSB41201 – Certificate IV in e-Business	2	24	0	0
BSB51101 – Diploma of e-Business	3	74	0	0
BSB51301 – Diploma of e-Learning	20	1	0	0
BSB60701 – Advanced Diploma of e-Business	0	22	0	0
EMPLOYMENT SERVICES				
BSB41904 – Certificate IV in Business (Employment Services)	28	0	0	0
FRANCHISING				
BSB40707 – Certificate IV in Franchising	0	0	2	0
BSB50507 – Diploma of Franchising	0	0	7	5
FRONTLINE MANAGEMENT				
BSB31207, BSB30504, BSB30501 – Certificate III in Frontline Management	405	461	631	267
BSB40807, BSB41004, BSB41001 – Certificate IV in Frontline Management	3,617	3,998	5,918	6,843
BSB51004, BSB51001 – Diploma of Business (Frontline Management)	506	42	18	0
BSB51107 – Diploma of Management	2,803	5,985	10,061	10,411
BSB60407 – Advanced Diploma of Management	397	1,115	1,723	1,531
GOVERNANCE				
BSB40907, BSB40901 – Certificate IV in Governance	156	22	1	8
BSB41910, BSB41907 – Certificate IV in Business (Governance)	33	75	43	37
BSB50707, BSB50901 – Diploma of Business (Governance)	30	12	17	3

Business Services – Qualification Completions

BSB – BUSINESS SERVICES (INCLUDES BSA) – QUALIFICATION COMPLETIONS	2009	2010	2011	PRELIMINARY 2012
HUMAN RESOURCES				
BSB41007, BSB40801 – Certificate IV in Human Resources	986	989	1,133	1,163
BSB50607, BSB50801 – Diploma of Human Resources Management	1,275	1,271	1,402	1,227
BSB60907, BSB60301 – Advanced Diploma of Management (Human Resources)	144	181	187	203
INTERNATIONAL TRADE				
BSB30607, BSB30804 – Certificate III in International Trade	46	61	44	20
BSB41107, BSB42004 – Certificate IV in International Trade	215	255	342	225
BSB50807, BSB52004 – Diploma of International Business	377	568	623	340
LEGAL				
BSB31007, BSA30200 – Certificate III in Business Administration (Legal)	346	427	419	383
BSB40110, BSB41207, BSA40200 – Certificate IV in Legal Services	142	154	177	197
BSB50110, BSB51007, BSA50200 – Diploma of Legal Services	147	122	99	92
MARKETING				
BSB41307, BSB40701 – Certificate IV in Marketing	918	959	749	737
BSB51207, BSB50701 – Diploma of Marketing	878	850	910	717
BSB60507, BSB60601 – Advanced Diploma of Marketing	499	415	469	236
MEDICAL				
BSB31107, BSB30704 – Certificate III in Business Administration (Medical)	888	974	1,105	1,283
MICRO BUSINESS				
BSB30307 – Certificate III in Micro Business Operations	389	399	392	372
OH&S				
BSB30707, BSB31606 – Certificate III in Occupational Health and Safety	70	115	193	334
BSB41407, BSB41604 – Certificate IV in Occupational Health and Safety	1,339	2,320	2,878	3,660
BSB51307, BSB51604 – Diploma of Occupational Health and Safety	647	949	1,118	1,180
BSB60607, BSB61004 – Advanced Diploma of Occupational Health and Safety	60	131	145	109

Business Services – Qualification Completions

BSB – BUSINESS SERVICES (INCLUDES BSA) – QUALIFICATION COMPLETIONS	2009	2010	2011	PRELIMINARY 2012
ORGANISATIONAL LEARNING				
BSB70107 – Vocational Graduate Certificate in Organisational Learning and Capability Development	0	1	0	0
BSB80107 – Vocational Graduate Diploma of Organisational Learning and Capability Development	0	1	0	0
PROJECT MANAGMENT				
BSB41507, BSB41504 – Certificate IV in Project Management	1,127	1,798	2,265	2,480
BSB51407, BSB51504 – Diploma of Project Management	1,576	2,075	3,202	2,983
BSB60707, BSB60904 – Advanced Diploma of Project Management	31	45	152	205
PURCHASING				
BSB41607, BSB41404 – Certificate IV in Purchasing	60	102	45	87
BSB51507, BSB51404 – Diploma of Purchasing	40	32	49	48
RECORDKEEPING				
BSB30807, BSB30401 – Certificate III in Recordkeeping	72	34	64	40
BSB41707, BSB40301 – Certificate IV in Recordkeeping	16	18	41	24
BSB51707, BSB50301 – Diploma of Recordkeeping	11	5	10	12
BSB60807 – Advanced Diploma of Recordkeeping	0	0	4	0
SMALL BUSINESS MANAGMENT				
BSB40407, BSB40401 – Certificate IV in Small Business Management	2,214	3,138	3,102	2,573
BSB41807, BSB41804 – Certificate IV in Unionism and Industrial Relations	5	3	3	0
MISCELLANEOUS				
BSA20100 – Certificate II in Business (Office Administration)	2	15	1	1
BSA20197 – Certificate II in Business (Office Administration)	2	11	0	0
BSA30100 – Certificate III in Business (Office Administration)	3	4	0	1
BSA30197 – Certificate III in Business (Office Administration)	0	10	4	1
BSB30301 – Certificate III in Business (Sales)	42	0	0	0

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